SAN ANTONIO COLLEGE LIBRARY’S

TECHNICAL SERVICES POLICIES AND PROCEDURES 1/6/10

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Acquisitions

The Acquisition unit of the library is responsible for:

- Ordering materials
- Receiving Materials
- Expediting purchases if necessary
- Tracking expenditures, thus assisting the budget manager in executing the budget.

“You can run the Millennium Acquisitions application to enter and send orders, claim or cancel orders, receive ordered items, process and post invoices, review and order recommended titles, generate and print accounting reports, adjust funds, maintain fund and vendor information, and create statistical reports on vendors.” (Millennium Manual). All of the above is the responsibility of the Acquisitions unit.

The Acquisitions unit uses various software applications to complete its tasks.

**Banner Financial System** – The official District big pot of money. It’s used to track commitments and expenditures. Requisitions for open purchase orders, library purchase orders, and direct pays (subscription renewals) are made through this system. Unless proven otherwise, this system is always right.

**Microsoft Excel**: Since Banner cannot track orders against an open purchase order and Millennium uses funds not purchase orders to track orders, open purchase orders and invoices are tracked via a spreadsheet. An Allocations Spreadsheet is also used.

**Millennium**: as noted above.

Libraries are exempt from state and district purchasing rules, according to sec.130.0101 of the Education Code. This means that the District corporate card can be used for purchases online (with the Taxpayer Identification number). The District also has a corporate account with Amazon.

Orders with vendor codes at district can be placed two ways, open purchase orders and library purchase orders. The online orders and Amazon orders are placed using a corporate card or L-Card.

- Open purchase orders are blanket purchase orders. A sum of money is set aside or encumbered and then orders are placed against it. This is used when you don’t know exactly what you will order, but you know you will spend approximately x amount with them. It is very much like a deposit account.
• Current vendors that require an open purchase order
  a. Baker and Taylor (state contract discounts)
  b. Alibris - out of print, publisher permanently out of stock and older stuff. When using Alibris choose (as a guideline) at least “very good” condition, “very good” seller reliability, and a price under $75.00
  c. NetLibrary (3% discount and 53.35% access fee)

• Library purchase orders are used when you know what and how much you will spend with a vendor. These are the direct orders and are placed through Banner. Dean Johnson is the approver for these. They are similar to requisitions, but when they print out at district, they are ready for signatures and faxing. There is no delay.

• The L-Card is used for online purchases or walk in orders to any book store. It looks like and acts as a credit card. If you use it locally, remember that District does not pay sales tax. If necessary, get a copy of the tax exempt form from Acquisitions beforehand. Like a credit card there is a reconciliation that must be done monthly using the JPMorgan web site. Training for this occurs when someone is issued the card.

District requires that all orders must be received and paid by the end of the fiscal year or August 31, after which all orders will be cancelled. Anything that arrives after the 31st will have to be taken out of the next year’s budget. Around the beginning of May, plans should be made to make sure that everything will arrive by August 15th to ensure that payment will be made in a timely manner.

Ordering Materials:

Basic pattern (at this time)

  a. Recommendation is received by Acquisitions staff from the Collection Manager.
  b. Catalog is checked for duplicates
  c. Item is ordered through vendor and
  d. Item is “ordered” through Millennium.
  e. Encumbrance is posted in Millennium

It’s a two party system. Whatever you do for one, you have to do for the other.

Orders created in Millennium need to be attached to a bibliographic record. The bibliographic record can be downloaded from OCLC or the bibliographic record can be created by using the “new” icon in the Acquisitions module’s top tool bar.

Fiscal Responsibilities of Acquisitions in Millennium

  a. Add new allocations to funds per collection manager’s direction
  b. Prepare periodic activity reports, currently monthly, for the librarians.
  c. Complete Fiscal Close at the end of August.
d. Delete old order records in a timeframe to be determined by the collection manager. Currently, a complete fiscal year is kept for an additional year, and only those order records that have item records attached are deleted.

Most librarians are responsible for utilizing the appropriate fund when ordering materials. The fund amount is determined by the collection manager.

As of August 2009, the following codes are in place:

<table>
<thead>
<tr>
<th>Code</th>
<th>Subject</th>
<th>Main Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>art</td>
<td>Art</td>
<td>Celia De Armond</td>
</tr>
<tr>
<td>bio</td>
<td>Biology</td>
<td>Candy Peterson</td>
</tr>
<tr>
<td>bus</td>
<td>Business</td>
<td>John Deosdade</td>
</tr>
<tr>
<td>chd</td>
<td>Child Development</td>
<td>Joan Alcott</td>
</tr>
<tr>
<td>con</td>
<td>Continuations</td>
<td>Tina Petimezas</td>
</tr>
<tr>
<td>cus</td>
<td>Customs</td>
<td>Tina Petimezas</td>
</tr>
<tr>
<td>dea</td>
<td>Dean</td>
<td>Dean Johnson</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(also used for popular books (pop))</td>
</tr>
<tr>
<td>edu</td>
<td>Education</td>
<td>Joan Alcott</td>
</tr>
<tr>
<td>eng</td>
<td>English</td>
<td>Tom Kuykendall</td>
</tr>
<tr>
<td>ent</td>
<td>Engineering Technology</td>
<td>Bob Singh</td>
</tr>
<tr>
<td>for</td>
<td>Foreign Literature</td>
<td>Eileen Oliver</td>
</tr>
<tr>
<td>gel</td>
<td>Geology</td>
<td>Candy Peterson</td>
</tr>
<tr>
<td>gen</td>
<td>General</td>
<td>used by all at the discretion of the collection manager</td>
</tr>
<tr>
<td>geo</td>
<td>Geography</td>
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</tr>
<tr>
<td>gov</td>
<td>Government</td>
<td>Eileen Oliver</td>
</tr>
<tr>
<td>his</td>
<td>History</td>
<td>Ralph Domas</td>
</tr>
<tr>
<td>hlt</td>
<td>Nursing &amp; Allied Health</td>
<td>Tom Bahlinger</td>
</tr>
<tr>
<td>itp</td>
<td>Interpretive Training</td>
<td>Stephen Dingman</td>
</tr>
<tr>
<td>law</td>
<td>Law</td>
<td>Eileen Oliver</td>
</tr>
<tr>
<td>lib</td>
<td>Library Science</td>
<td>Tina Petimezas</td>
</tr>
</tbody>
</table>
Each librarian indicates the fund to be used with the recommendation

**Millennium fiscal responsibilities**

**Beginning the fiscal year.**

- Assist the collection manager by keying in the budget for the fiscal year in Excel.
- Excel Budget spreadsheet never comes out balanced, so some adjustment is needed to make it do so. Last year’s spreadsheet is on the J drive in folder Acquisitions/Excel 09/budget09
- In Millennium add each budgeted amount into the correct fund code
  Go to funds
  Go to Current Funds
  Go to Adjustment
  Check “use form”
  Check each fund in turn and add the correct appropriation to each.
  Post when done
Recurring Reports

- Go to Funds
- Go to Hierarchies
  - Select one hierarchy
  - Select Report
  - Print Report to local printer
  - Select another hierarchy
  - Select Report
  - Print Report to local printer
- Go to Current Funds
- Double click to see funds
- Click on Activity
- Name the report – something like September Activity
- Click on show all
- Click start
- Select e-mail printer
- Click on print
Click on print out is okay.

- Click on clear payment history. This erases the activity i.e. the expenditures and encumbrances for the current period. Otherwise every month will print out the activity from the beginning of the fiscal year..... a very, very long report.

- Copy email text
- Paste into Word document
- Insert page breaks after each fund code
- Distribute

End of Fiscal year

**Reports to District** - Usually requested by district around Aug. 7th. We consider those books still on order with the assumption that they will be here before the end of August.

- Number of volumes and total cost
Create a list of orders for the fiscal year using order records created after Sept 1 and for m b (books). Only books are considered capital assets at this time.

Select statistics on the right hand toolbar.
Find sacvolumes
Edit query
Find you review file
Run query

Number of deletions and cost of deletions i.e. withdrawn). Create a list of items using lcode 1 is equal to 1 and lcode 2 equal to w.

Select statistics on the right hand toolbar.
Go to saved query
Find sacwithdrawn
Edit query
Find your review file
Run query

Clean up orders

Create list of titles still on order use orders created greater than r September 1 of current year append line orders status equal to o (on order)
Check “Customer Service “ in TS3 to see the status
Cancel if necessary
Check status of Alibris books’ status their website
Check Direct orders via the invoices for the Library Purchase orders

Create a list of orders from the previous year i.e.at the end of fy10 create a list of FY09. Use the command “ orders created before the current fiscal year ( orders created less than (<) September 1 whatever was the beginning of the year).”

Select “delete records” on left tool bar.
Select your review file
Select start
Select Delete order records only
Select Delete

Fiscal Close

Make sure no one is in the process of keying invoices
Select Fiscal Close on the left tool bar
Program will lead you through
Post all invoices
Run fund activity reports
Clear payment history file
- You can run your yearend statistics (usually required by district earlier in the month)
- You can run and reset vendors (recommended)
- Right now we reset all funds to zero and start the new year with a clean slate
Baker and Taylor Checklist

- Login: sacsatx2 and rope2
- Open each cart:
  - Check for NYP, out of print books
  - Add fund code to NYP and Out of print books
  - Move NYP and Out of print books to respective carts
- Close cart
- Select “Carts”
- Click arrow on Select Function on the left side of the cart.
- Select “split”
- Select “cart options”
- Select “Apply Duplicates”
  - Do not apply duplicates to any missing or billed carts
- Open Cart
- Select “Print Cart” and print.
- Open Millennium
- Check for duplicates by title
- Open Baker and Taylor
- Delete any duplicates found in Millennium
- Open Baker and Taylor Administration site
- Login sacsatx and rope
- Select Admin
- Select Marc Profile list
- Select Mil Load
- Select Marc Customization
- Change fund (#4) either to a single fund per cart or gen for a mixed cart
- Change vendor (#5) to bt for books or bte for videos
- Update to save changes
- logout
- In Baker and Taylor Acquisitions select “cart options”
- Select “Download”
- Download to J drive
- Open FTP
- Click okay
- Check auto
- Find the J drive
- Select .mrc files
- Transfer to remote site
- Delete files from local site
- Select Close (not X)

After 12:30 Noon or 5 p.m. files should be on Millennium.

- Create list storing order records using the following command: order records created on whatever date the files loaded

- On the left hand tool bar select Rapid Receive
- Select Rapid Update
- In Field select volumes and value 1
- And in Field select local purchase order “p”
- Value equals the purchase order
- Select the review file
- Select start.
- Go back to create list
- Find your list
- Make any changes to the order records: fund changes, location changes, changes in the number of volumes, etc.
- Sort list by Bibliographic title
- Dedup list
- Check list for duplicate titles i.e. one paperback and one hardback ordered at the same time
- In Baker and Taylor, combine the carts into one order.
- Select Function
- Select cart options
- Change the cart name to the order name
- Add Purchase Order number
- Update cart
- Select Function
Select merge
Merge all the other carts in that order.
Select Function
Select mass maintenance
Replace line item notes with blank spaces

Update changes
Select Function
Select Order
In Millennium
Click: Go
Click Selection List
Click: Review File:
Select review file with the current order
Click: start
Open: edit on the top bar
Click: “Select All”
Put in order date
• Place on order
• Go to Invoices
• Post all.
• Open Excel
• Open Baker and Taylor spreadsheet and enter amount and quantity in left hand column.

Alibris Checklist

Alibris can be accessed from Baker and Taylor, or directly from www.alibris.com

• Select copy using guidelines discussed above.
• Put into either cart or wishlist. - If in cart, no other library can select it for 12 hours but there’s no download. If in wishlist the selection isn’t safe but there is a download capability. You can put the selections into a cart, move them to wishlist for download, and then back into the safety of the cart.
• Download to file.
• Print the file
• Make note of any funds associated with the list
• Download an OCLC record (do not add holdings ; this will be done by catalogers) or....create a minimum new record
  o To create a new record chooses the “new” icon. A template will appear prompting you to create a minimum bib record and an attached order record
• Create an order record by using the order template. Make sure to use the correct fund code, form ,vendor code, and number of volumes.
• Create a list of order records
• Choose Selection List
• “Order “ the list
• Go to Alibris’ website
• Go to cart
• Follow directions and order the material
• Add order amount to spreadsheet

NetLibrary

NetLibrary books are handled in a slightly different manner. These require manipulation through the cataloging module and are ordered through the cataloging unit.

Orders directly to vendor

• Search Millennium
• Download a record (orders for Gale e-books always have a bib record created in Millennium not downloaded from OCLC) Do not add holdings
• Make sure to check the form and vendor and number of volumes on the order record.
• Go to the Excel Allocations spreadsheet
• Choose the next number for the purchase order; put in vendor and price
• Go to Banner
• Create a Library Purchase
• Pay close attention to the account that needs to be used (depends on the format being ordered)

Acquisitions Procedures - Receiving

Baker & Taylor –

I. -- Single box shipments

1. Open box
2. Take materials out
3. Check material condition
   a. If there are no damages place books on book truck in alphabetical order by B&T invoice. Titles that start with numbers are placed at the end of the B&T invoice. They have to be placed in the truck according to spelling.
   b. Place encyclopedias, dictionaries, item priced $100 or more and atlases on a separate book truck and label them Reference. Place children books and books that will go into the popular collection in separate truck and label the trucks accordingly. These items will be reviewed by our collection development manager to make sure they will be placed in the appropriate collections.
      i. If having a hard time deciding where to place a book, just live it in the regular truck. You will find location information while processing invoices in Millennium.
   c. If there are damaged materials or shipment shortages, contact the vendor’s customer service representative assign to our library to report the problem.
      i. Return Tag Authorization number (RTA#) will be given to us in order to return materials.
         1. If materials are in stock the B&T will offer a non-charge replacement, in that case a request for payment to accounts payable can be done as soon as the replacement is received.
         2. If materials are not in stock the representative will send us a credit for the item or items in question and the materials will be re-order and re-bill. Request invoice payment to accounts payable as soon as the credit memo is received.

II. -- Multiple box shipments

1. Arrange boxes by “ATS #”
2. Open box one and place content on the receiving table
3. Stock materials up on the table by box, in packing list order and from the bottom to the top of the list. This will make things easier when the materials have to be arranged in alphabetical order by invoice. Open the rest of the boxes following the above procedures.

4. Check material condition
   a. If there are no damages place books on book truck in alphabetical order by invoice. Titles that start with numbers are placed at the end of the B&T invoice. They have to be placed in the truck according to spelling.
   b. Place encyclopedias, dictionaries, item priced $100 or more and atlases on a separate book truck and label them Reference. Place children books and books that will go into the popular collection in separate truck and label the trucks accordantly. These items will be review by our collection development manager to make sure they will be placed in the appropriate collections.
      i. If having a hard time deciding where to place a book, just live it in the regular truck. You will find location information while processing invoices in Millennium.
   c. If there are damaged materials or shipment shortages, contact the customer service representative assign to our library to report the problem.
      i. RTA # will be given to us in order to return materials.
         1. If materials are in stock a non-charge replacement will be offered. In that case a request for payment to accounts payable can be done as soon as the replacement is received.
         2. If materials are not in stock the representative will send us a credit for the item or items in question and the materials will be re-order and re-bill. Request invoice payment to accounts payable as soon as the credit memo is received.

5. The next step after all materials have been taken out of the boxes is to arrange and place them on book trucks in alphabetical order by invoice. Later when the invoice is received in Millennium materials will have to be sort by location and edition.

III. --- Processing Invoices

1. Login into Millennium Acquisitions
2. Click invoice from the left down menu
IV. -- Choose a Session

1. Choose an available session by clicking once on that session and then click on Select button or double click on the available session of your choice.
V. --- Invoice Processing

1. Once a session is selected the next step is to process the invoice.
2. Key in the vendor’s invoice number
3. Key in invoice date
4. Search for the items that need to be received by clicking the index pull down menu and choosing one of the following index criteria:
   a. Title – Only the first few words of the title are needed
   b. LC Call #
5. Type in the information for the index criteria used and the click the search button.

6. Choose the record that matches your invoice item and double click on it.
7. An order record for the item will show at the bottom of the invoice.
8. Click on the “use order record” button and press enter.

9. Enter the price of the item on the amount window and press enter.
10. Follow procedures (Roman numeral “V” 4 – 9) for the rest of the invoice items.
**Invoice Processing**

<table>
<thead>
<tr>
<th>#</th>
<th>Record #</th>
<th>Title</th>
<th>Copies</th>
<th>Amount</th>
<th>Fund</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>014601011</td>
<td>iPod &amp; iTunes for dummies / by Tony Bove.</td>
<td>1</td>
<td>$0.00</td>
<td>gen</td>
<td></td>
</tr>
</tbody>
</table>

**Summary**

Record 014601011

- Last Updated: 07-02-2009
- Created: 07-01-2009
- Revisions: 3

- LOCATION: sac
- FUND: gen
- STATUS:...

**Enter item price** $0.00

- Amount: $0.00
11. Once all the invoice items have been entered the value added price (VAS) needs to be added at the end of the invoice as a “Y” record.

12. The creating X or Y record box will show and the fund “vas - B&T Processing “ needs to be selected.

13. The vas price needs to be entered on the amount of payment.

14. Click the “ok” button that way the amount will show on the invoice.

15. Click the finish button on the upper right hand side of the invoice.

16. Different boxes will pop up with the totals for shipping, service charge and total tab through all of them and click the finish button. Another box will show up asking if you want to use the computed totals, click yes then click the finish upper right hand side button. This will finish the invoice and will take you to the session screen where you will use the same session to start a new invoice.

17. Follow same procedures as in roman numeral “IV” – Choose a session.

18. All invoices for other vendors are processed the same way with the exception of the VAS charge. For all other invoices we need to use the shipping charge.
19. Once the invoice is finished go to the invoice processing screen and click the “post all” button at the bottom of the screen, send the report to your email and proceed with the process. This will clear up the chosen session an all of the item will show payment information.

20. Each shipment comes with an invoice, once the invoices are processed on Millennium; the invoices that are mailed by the vendor have to be approved for payment by entering the purchase order number for the vendor, the signature of the person approving the payment and the date of approval.

21. Place all invoices inside an envelope and send them via PONY to the district’s accounts payable department.

22. At the end of the month vendors usually send statements with balances owed. Check the district’s Banner Financial System to make sure that checks has been processed for the items listed and if not please contact the accounts payable department to follow up on payment.

23. To be able to use the Banner Financial System individuals have to take Acquisitions training and the Banner training in order to gain access to the system. All the receiving information will be obtained during those trainings.

24. All invoice copies are kept in binders for a period of a year.

Receiving Library Purchase Orders

1. Follow the same procedures for B&T # V. -Invoice processing - mentioned above with the exception that we use shipping charges instead of value added charges.

2. For invoice number we use the library purchase order number for every invoice received. When the system shows that the invoice already exists please click continue and proceed.

3. Make a copy of the approved invoice send original to district for payment and keep the copy for your records.

4. Once a month check the Banner Financial System to make sure that the invoices have been processed for payment and write check information on your copy of the purchase order.

5. Keep all invoices related to the purchase order attached to your copy of the PO for record keeping.

6. All records are bound at the end of the fiscal year and kept for three years.

Processing Donations

1. Donations of library materials are routed to the collection manager

2. The collection manager will give the donation to the librarian in charge of the subject area to make the decision of accepting or discarding the book

3. If the decision is to discard the book, the book will be place on the shelf near the technical service main entrance.

4. If the book is accepted, the librarian has to decide the location for the book and the book will be given back to acquisitions

5. We record the donation on the excel sheet named gifts for end of year purposes.

6. The donation is then giving to cataloging for processing
7. Thank you cards will only be sent if donator requests acknowledgment of their gift. In that case the information will be given to the library office secretary who will take care of the process.

**Processing Databases Renewals**

1. The department’s chair will decide what subscriptions will be renewed and will approve the vendor’s renewal subscription forms.
2. Once the department’s chair receives an invoice she will give the invoice to the acquisitions department to process payment.
3. If the SAC Library is responsible for full payment, the payment will be processes by creating an invoice/credit memo in the Banner Financial System. Once the invoice is processed a transmittal sheet will be attached to the vendor’s invoice it will be forward to accounts payable. Acquisitions keeps one copy of the invoice with the Banner invoice number and the date of processing and another invoice is given to the budget manager for record keeping.
4. If the vendor’s invoice amount is to be share with other libraries, the budget manager will email all other libraries with their share information and we will process our share as described in point three of this procedures.
5. Fallow up with the other colleges to make sure that payments have been processed.
6. Check Banner financial System to make sure that checks have been processed.

**Open Purchase Orders**

1. Once the budget is released at the beginning of each fiscal year and by the budget manager’s approval; open purchase orders have to be process for the following vendors
   a. West
   b. Baker & Taylor
   c. Alibris
   d. Gale
   e. Heckman Bindery – Occasionally
   f. EBSCO
   g. MARCIVE
2. Payments to the above vendors will be processed using the money allocated on the vendor’s open purchase orders.
3. Throughout the year money might have to be added or deducted from purchase orders to meet payment activity.
4. At the end of the year if there is any money left it will have to be transfer to main library account or any other accounts that might need money.
**Acquisitions Mail**

1. All publisher catalogs should be placed in the publisher’s catalog shelf in the back area of technical services.
2. Discard previous year or season catalogs.
3. Catalogs should be placed in alphabetical order by title.
4. All reference catalogs go to the collection manager.
5. All other materials are placed on the librarian’s mail box by their subject area as follows:

<table>
<thead>
<tr>
<th>LIBRARIAN</th>
<th>TOPIC</th>
<th>TOPIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcott</td>
<td>Child Development</td>
<td>Literacy</td>
</tr>
<tr>
<td></td>
<td>Counseling</td>
<td>Preschool</td>
</tr>
<tr>
<td></td>
<td>Day Care</td>
<td>Psychology</td>
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<tr>
<td></td>
<td>Education</td>
<td>Research</td>
</tr>
<tr>
<td>Bahlinger</td>
<td>AIDS</td>
<td>Medicine</td>
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<td></td>
<td>Dentistry</td>
<td>Microbiology</td>
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<td></td>
<td>Gerontology</td>
<td>Nursing</td>
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<td>Balcom</td>
<td>Astronomy</td>
<td>Mathematics</td>
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<td></td>
<td>Computer Science</td>
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<td>De Armond</td>
<td>Architecture</td>
<td>Music</td>
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<td></td>
<td>Art</td>
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<td></td>
<td>Arts and Crafts</td>
<td>Plays</td>
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<td></td>
<td>Communications</td>
<td>Speech</td>
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<td>Interior Design</td>
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<td>Social Changes</td>
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<td></td>
<td>Environment</td>
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GENERAL CATALOGING PROCEDURES:

Log on to Millennium

Log on to OCLC Connexion

1. In Millennium, search for item (title, author, ISBN search)
   a. If multiple records are found, look for the one with the SAC order record attached.

2. Update order record
   a. Double click on order record.
   b. Click on CDATE field and hit “t” – this will insert date (OR double click on field to open calendar, and click okay to insert date)
   c. Hit Save button, and click “yes”.
   d. Click on Edit button to get into edit mode.

3. Compare record with OCLC
   a. Look up record in OCLC using ISBN or other search. (NOTE: Do not just copy and paste the OCLC # from Millennium into OCLC. Doing so means you won’t find a better record if it’s out there.
   b. If you find a better record, overlay it – Copy the OCLC # of the new record, and paste in the 001 in Millennium. Save it, and CLOSE (if the record is open, the record won’t overlay). Then update holdings and export the record from OCLC. Delete OCLC holdings of the old record that was not used.
   c. If the record in Millennium is fine, but has been enhanced in OCLC in the interim, add enhancements to Millennium (or overlay, if there are significant changes).
   d. While in OCLC, make sure our holdings are attached to the correct record. Update holdings or delete holdings as necessary.

4. Further edits in Millennium
   a. Delete prices from 020 and change 024 to 020.
   b. Edit call number field so that it is coded 050 00. Otherwise the call number shows up twice in the OPAC when doing call number searches.
   c. 856’s containing Table of Contents, Contributor Biographical Information, Book Reviews or Publisher’s Description are acceptable.
   d. Remove 856’s containing Sample Text. If it’s a children’s book, the publisher’s description can be copied and pasted into a 520 field, if desired.
   e. Remove any non-LC subject headings (such as headings in a foreign language and heading from Sears, MESH, or NASA). For juvenile books change Sears heading to LCSH (don’t just change indicators, verify subject
authority on Millennium – many juvenile subjects do not match LCSH exactly); making sure to add ‹juvenile fiction or ‹juvenile literature.

f. Enhance tables of contents as necessary – if the 505 contains important individual titles or author/title entries, make sure they’re coded so they’ll be searchable. (ex.: 505 00 ‹Cataloging is easy /‹Mary L. Brary -- ‹Have fun with MARC fields /‹Katherine A. Logger).

g. Remove any old NOTIS notes (935 field).

h. Make other changes as necessary – incorrect tags, codes, or indicators will appear in red.

i. Double-check or create call numbers as necessary, using ClassWeb. If juvenile books are cuttered with letters from the title (ex. PZ8 .G276 Mar), change the cutter to conform to regular LC standards (ex. PZ8 .G276 M37).

j. Double check call number against SAC’s call numbers to avoid duplication.

k. Copy call number (Ctrl-C, so you can paste it in the Item record.

l. Save record.

5. Create item record

a. Click on Summary button, then the Summary tab if it’s not already selected.

b. Change “view” from order to item.

c. Click on “attach new item”

NOTE: be sure that you have selected the proper item default: Go to Admin>Settings>New Records – section called “New record templates”. For regular circulating books, template should be set to sacitm.

d. Enter information as prompted (if you copied the call number in the last step, just us Ctrl-V to paste when prompted for call #).

NOTE: if you don’t recall the price, it’s okay, you can enter this in later.

e. In the “x note” field type in your initials—plus any other information that si needed (ex. Gift) or (ex. Route to GovDocs when withdrawn)

f. If envelope contains more than 1 item (ex. 1 booklet plus 1 pamphlet add the information into the “m message” field.

g. Change COPY# from ”0” to “1”. If there are two or more duplicate copies, change copy number to 2(for 2nd copy), 3(for 3rd copy, etc.) When finished, click SAVE.

h. Select Edit>Import Order Information. Click “use”. Save. If you didn’t enter price information before, look at imported information and enter price into PRICE field. Make sure to SAVE after any changes.

6. View record in OPAC to verify that the corrections have been updated. You can do this from Millennium by selecting View>Public Display.

7. If the book did not come pre-labeled, write the call number on a post-it note and stick it to the title page (but sticking out so bindery person can find it). If the book is
labeled incorrectly, write correct call number on a post-it and stick it on the title page. Cross out the incorrect spine label.
ADDITIONAL COMMENTS ON SPECIAL MATERIALS / CIRCUMSTANCES

Multi-volume Sets

- Make sure to change item templates from sacitm to sacref or srefit.
- Double check location after cataloging – default for multi-volumes is Reference, but to set may not be going to Reference.
- Divide the total price of the set by the number of volumes, and enter per/volume amount in the PRICE field. (ex. A 4-volume set that cost $200, put $50 in each item’s price field).
- If you are overlaying the record, check the location field in the bib record afterward. If the default was set to Reference, it will probably show “multi”. Edit accordingly.
- For multi-volume sets cataloged to Reference, suppress each item and attach a checkin record:
  - Click on “Attach new checkin”.
  - Choose template “sacser:SAC Serials Checkin”.
  - “Label Type” click next.
  - Fill in correct location (ex. Sref) click next.
  - Click next, next, next, cancel (when asked if you want to create cards).

Genre Headings for Literature and Special Formats

- Always add one or more genre terms to fiction and movies.
  - GSAFD – see booklet or http://www.library.northwestern.edu/public/gsafd/gsafd.mrc.txt
  - LCSH headings can be used as genre terms as well (entry example: 655_0 Short stories, Hispanic American). Use Connexion (the Authorities menu) or http://authorities.loc.gov/ or Class Web to search LC subject headings.
- Always add form heading to videocassettes – 655_0 Video recordings
- Always add form heading to DVD’s – 655_0 DVD-Video discs
- For foreign films:
  - Add genre heading – 655_0 Foreign films.
  - Add country designation in a 650 – 650_0 Foreign films, French.
- Always add two form headings to music CD’s:
  - 655_0 Sound recordings.
  - 655_0 Compact discs.
- For individual CD-ROMs and DVD-ROMs add genres:
  - CD-ROMs
  - DVD-ROMs
- For juvenile fiction add -- 655_0 Juvenile fiction
- For juvenile literature add – 655_0 Juvenile literature
- If a juvenile book is “young adult” leave the subdivision ‡v Juvenile fiction and add the genre 655_0 Young adult fiction
- SPC and NWV use local genre headings in their records. If you see “Schematics” or “Primary source” in a 655, do not delete!
Older Edition Replaced by a New Edition

- Unless specified otherwise, withdraw any previous editions owned by SAC when cataloging a new edition of a book
  - Print out the record (from the OPAC) for the old edition. Pull book to withdrawn on Millennium.
  - If only SAC owns the withdrawn book, go into the item record and change the ICODE2 and STATUS to w (remembering to save) and in the bib record change the SUPPRESS field to n. Delete holdings from OCLC.
  - If another school also owns the book, change ICODE2 and STATUS to w in the item record, but don’t suppress the bib. Add a 500 note saying “San Antonio College no longer owns this book [or volume, or edition]”. Delete holdings from OCLC.

Replacements

- If a replacement copy exactly matches the previous copy, use the same bib record. When the original book has the status of: LOST & PAID($) or MISSING (m), leave the status alone and change the ICODE to W (withdrawn).
- If the original book has the status of: BILLED (n), leave the status alone and change the ICODE2 to u (suppressed). Billed books cannot be withdrawn because patron number is attached to record. Once book becomes Lost & Paid, it can then be withdrawn.
- If original book has a status available but the ICODE2 is suppressed check stacks to see if book has been re-shelved. If book is on the shelf change ICODE2 to blank.
- If a replacement copy is a different edition or imprint, download the correct record, update holdings on OCLC, remove holdings from OCLC for old record, and transfer the order record in Millennium to the new record. Make sure to suppress the “old” record if SAC was the only library with holdings, and if there are no other items attached. If other ACCD libraries still own a copy add a 500 note to the old bib record (ex. San Antonio College Library no longer owns this book)

E-resources (Online and CD-ROMs or DVD-ROMs)

- Always add the GMD (¢h[electronic resource])
- Add a 538 note (ex: “Mode of access: Internet”)
- If the resource has a PURL, make sure to use it in the 856. Also note it in the 538 (ex: “Current access is available via PURL). If the regular URL is available, place it in the 538 (ex: Address as of 9/16/05: http://www.eresource.com ; current access is available via PURL” ; always leave a space between the URL and the semicolon), the PURL is also placed in 856 4_ field.
- If cataloging a book and the record contains a URL to the complete resource, make sure the record contains a 530 note “Also available via the Internet.”
Books Accompanied by CD-ROMs or Other Materials

- Attach a new item record for the CD. Do not include the price or import the order information. (see expanded procedures starting on page )
  - ITYPE should be changed to:
    - 11 Computer File (for DC-ROMs or diskettes)
    - 7 Projected Media (if it's a film DVD)
    - 9 Sound Recording (if it's a music CD)
    - 8 Spoken Recording
    - 0 Monograph (if it's a guide, booklet, pamphlet, etc.)
  - Add a Volume field. Designate the item “disc”, or if multiple, “disc 1”, “disc 2”, etc. (for CD-ROMs, etc.)
  - “video” (if it’s a film DVD)
  - “booklet” (if it’s a guide, booklet, pamphlet, etc.)
- Location should be the same as the book it accompanies, and status for CIRC items should be “In Process”. Reference, Bookcase, and McAllister books have the status “Lib Use Only”

Locations

- If a book costs more than $100, it must go to either the Bookcase or Reference locations.
- If a video costs more than $100, it will go to Reserve (lib use only). Videos under $100 are placed in the circulating collection.
- Any new books (“new” defined as previous 2 years) that are deemed of “popular” interest can go to the Popular shelves (location: sopp)
- Juvenile books go to the Juvenile stacks (location: schil). Fiction in this location should all have PZ call numbers. If a “juvenile book is deemed appropriate for the regular collection (Harry Potter, for example) it should be given an adult literature call number. Topical juvenile literature (ex. “Geology for kids” should be classed appropriately (ex. QE29).
- Books by local authors go to the McAllister collection (location: smca), although sometimes they make a stop at the popular collection (location: sopp) on the way.
- Books signed by the author, illustrator, etc. go to McAllister (location: smca).

If Information is Printed on the Back Inside Cover

- Send to Bindery with a post-it note informing them what they can do.
- If the information is important (tables, indexes, contents, charts, etc.) put COPY on the post-it note.
- If the information is not important (duplicate illustrations from the front end-pages) put DO NOT COPY on the post-it note.
- Bindery will Xerox important information, glue it to the nearest inside pages, and add a note to the end-page: TABLE TRANSFERRED OF INFORMATION TRANSFERRED
- Binder will glue the pocket, barcode, etc., on the back inside cover as usual.
Call Number is Missing

- Check OCLC for the correct call number; if a previous edition is listed, use that call number, changing the date of publication.
- If the OCLC record is missing a call number, check LC's Online Catalog at http://catalog.loc.gov/ for the correct call number or for a call number for an older edition—if you find an older number, be sure and use the date lasted in the imprint.
- If no call number is listed in LC, check World Cat for other libraries holding this title and double-check their catalogs for a call number. Try and use a comparable college call number and not a public library call number.
- If no number is listed through World Cat, create an LC number using LC’s Classification Plus. [Call numbers should be created from the first subject heading]
- Give the call number an 050 00 designation so that it displays properly in the public catalog.
- Copy the call number on a post-it note and attach the note to an inside page so that Bindery can duplicate it for the label and book pocket.

Transfer an Incorrect Order Record to Another Record in the System

- Retrieve the bibliographic record you want to transfer.
- In SUMMARY tab open order record.
- Click EDIT (top left) transfer attached.
- The system will show an empty Title window: you can change this window to Author if it is easier to find the correct record that way.
- When destination record is found open the bibliographic record.
- Click on USE BIB. You have two options: If you want to Transfer all attached records, Retain source bib of Transfer all attached records, Delete Source bib.
  NOTE: You will be asked if you want to retain or delete the wrong record; however if the incorrect record has title-level holdings, only the TRANSFER ATTACHED RECORDS DISPLAYS. If you choose transfer all attached records the incorrect record will be deleted automatically. If you do not want to transfer all attached records, select the check boxes of the title-level holds to transfer and hit OK.
- Transfer all attached records, delete source bib. Add sac to bib record holdings. When sac is added to Location in bib, record changes to Multi.

Table of Contents

- If the record contains material by one author alone, leave the Contents under 505 0.
- If the record is by one author and it is vital to list the contents, follow the direction in #3.
- If the record contains materials by a number of authors and there is no URL for a table of contents [TOC], add  †† and ††r for each individual title and author. Remember to use †g for articles (a, the, an) or for parts of the book that are not actually an author-title entry. Change the Contents to 505 00. If multiple authors exist for a single title, use the following form: †vrWalter Jones †gand †rEarl Able. Titles that begin with an article are coded: †gThe †tred pony. All caps chapter titles are †g whereas the rest of the title is †t.
Juvenile Material

- Correct the subject headings from Sears subject heading by changing the code from 650.1 to 650.0.
- To these headings, add the subdivision: ǂvJuvenile fiction or ǂvJuvenile literature
- You may leave the 520 Publisher’s description note.
- If you feel the material is more young adult than juvenile, you may delete the juvenile subdivisions entirely; ask yourself would the patron be angry or disappointed in this work if they located this work on the shelves and find out it is juvenile?
- Call numbers with extra letters should always be cuttered instead; ex.: Loo would be entered: L66
- Add a 586 note for books that have won awards; ex.: Winner of the Newbury Medal.
- Add genre form to young adult fiction – example (655 0 Young adult fiction.)

Accompanying Materials – CDROMs/Non-Music

- Remove CD and CD holder from book.
- Put the CD in a case, discard the holder; transfer any instructions on software to the new case.
- Attach a barcode to the upper right corner of the front of the CD case; the indentation to open the CD should be facing up.
- Catalog the book as above, but be sure the collation includes: ǂe 1 computer optical disk (4 ¾%) or CD-ROM (4 ¾ in.) or 1 CD-ROM or 1 DVD-ROM or videodisc (4 ¾%)
- Process the CD from ATTACH NEW ITEM, but do not include the price or the Import Order Information.
- Always add Vol.: disc, disc 1, disc or disc 1-2, etc.
- Change the I type: 11 if a CD or to one of the types listed below.
- Use the genre CD-ROMs or DVD-ROMs

Accompanying Material Types – Booklets, Guides, Pamphlets, etc.

- Same as CDs, except:
- I Type: 0 (zero)
- Location: ssta
- Vol.: booklet

Accompanying Material Types – Videos (VHS and DVD)

- Same as CDs, except
- I Type: 7
- Location: ssta
- Vol.: video

Accompanying Material Type – CDs/Music
• Same as CDs, except:
  • ltype: 8
  • Location: ssta
  • Vol.: disc

Compact DISC/MUSIC

• Make sure the entry includes the 240 10 [uniform title] if needed.
• Make sure the entry includes the GMD Žh[sound recording].
• 300 ___ should include: Ža number of discs and time if listed :Žb digital or :Žb
digital, stereo ;Žc 4 ¼ in.
• Examples:
  o Ža1 sound disc :Žbdigital, stereo. ;Žc4 ¼ in.
  o Ža1 sound disc (74 min.) :Žbdigital ;Žc4 ¼ in.
  o Žasound discs :Žbdigital, stereo. ;Žc4 ¼ in.
• 500 ___ note should be added for type of material: 500 ___ Compact discs.
• Add genres: f 655_0 Sound recording. + f 655_0 Compact discs + specific type
  of music as needed, such as: Live sound recordings, Motion picture track, Music
  videos, Musicals, Operas, Rock films, Rock music, Television music.
• ltype: 8

Videorecording on VHS or DVD

• Make sure the entry (245 field) includes the GMD Žh[(VHS) videorecording] or
  Žh[(DVD) videorecording]
• 300 should include: Ža number of videos & (time) :Žb sd., col., double sided ; or
  Žb sd, b&w ; Žc size.
  Examples:
  o 1 videodisc (148 min.) :Žbsd., col. ;Žc1/2 in.
  o 5 videodiscs (ca. 412 min.) :Žsd., b&w. ;Žc4 ¾ in.
  o 1 videocassette (ca. 412 min.) :Žb sd., col. ;Žc1/2 in.
  o 1 videocassette (57 min.) :Žbsd., col. With b&w sequences ;Žc1/2 in.
• Notes should include such material as:
  o 500 ___ Based on the novel by Margaret Mitchell. + 600 1_ Michell,
    Margaret.Žd1900-1949 ŽvFilm and video adaptation.
  o 500 ___ Originally produced as a motion picture in 1939.
  o 500 ___ Special features: scene access, theatrical trailer.
  o 511 1_[cast]
  o 521 8_ Rated G.
  o 538 ___ DVD: Dolby digital 5.1 or mono; standard version.
  o 546 ___ In English with optional subtitles in English or French: closed-caption
    in English for the hearing impaired. + f 655 _7 Video recordings for the
    hearing impaired.
  o 586 8_ Academy Awards list.
• For dramatizations, add Žv Drama to the subject headings: (ex.
  BoysŽxTravelŽMississippi RiverŽvDrama
For children’s films, use the subdivision Juvenile films and the genre children’s films

Add genres: Video recordings. Or DVD-Video discs.

Change all genres to Streaming videos.

Streaming Videos

Make sure the 245 field includes the GMD [electronic resource]

There is no 300 field

Notes should include such material as:
  o 500 Title from website (viewed Sept. 15, 2006).
  o 500 Streaming video (152 min.).
  o 538 Mode of access: World Wide Web.
  o 538 System requirements: Windows Media or Quicktime software.
  o 500 FMG on demand

Add genres: Streaming videos.

Change all genres to Streaming videos.


Item record should include
  o Location SAC Internet
  o Type EBOOK
  o Status Available
  o Call number c 099 E-Videos

Problem Shelf

Includes repairs, withdrawns, damaged items, reinstates and any other problems that can happen to a library item. Items are routed from Circ (with a problem slip filled out, which is not always filled out correctly) or a librarian.

Sort items by problem.

Route repairs and label corrections to bindery.

Collection manager needs to review reinstates. Items might be reinstated, withdrawn, or a later edition will be ordered.

Damaged videos and music CD’s are withdrawn and a new one ordered. Check with collection manager.

Cataloging technician reinstates and makes any corrections that are needed for the rest of the items.

All withdrawn items must be initialed by subject specialist.
Popular Collection Weeding

- The Popular collection is weeded once a year (late May or June). Only the last two years are retained in the Popular collection. The older books are normally placed in the regular circulating collection. Books by local authors might be placed in the McAllister collection.
- Pull all the older books, keeping the last two years in the Popular collection.
- On Millennium check books out to technical services using the code (sts).
- Route books to collection manager for retention and routing authority.
- Once books are routed back to technical service remove Popular spine label and update Millennium with new location. Type spine labels if needed.
- Withdraw books that are not retained.
Withdrawing Tips

Withdrawal decisions must be so designated by the librarian assigned to the specific subject area or by the Collection Manager. Do not accept withdrawals from anyone else. Remember to delete checkins if needed.

For Simple Withdrawals, SAC only

- In the item, change ICODE2 to w
- In the item, change STATUS to w
- In EDIT (Bib record), Change SUPPRESS to n
- Delete the material from OCLC holdings

For Simple Withdrawals, SAC and Another Library

- In the item, change ICODE2 to w
- In the item, change STATUS to w
- In EDIT, add: n 500 San Antonio College Library no longer owns this book. (or this edition, or this volume, etc.)
- Delete the material from OCLC holdings
- Note: if the only other library holding the book is St. Philip's and the location is CWITH, you may consider the book withdrawn from that library and treat the record as if only SAC owns it – but go ahead and add an n 500 San Antonio College Library no longer owns this book. (or you should SUPPRESS the record)

For Missing, SAC only

- In the item, change ICODE2 to w
- In the item, change STATUS to m
- In EDIT, change SUPPRESS to n
- Delete the material from OCLC holdings.

For Missing, SAC & Another Library

- In the item, change ICODE2 to w
- In the item, change STATUS to m
- In EDIT, add: n 500 San Antonio College Library no longer owns this book. (or this volume, or this edition, etc.)
- Delete the material from OCLC holdings
- Do not SUPPRESS unless other libraries have withdrawn all their copies

For Lost & Paid

- In the item, change ICODE2 to w
- In the item, change STATUS to $
- In EDIT, add: n 500 San Antonio College Library no longer owns this book. (or this volume, or this edition, etc.)
- Delete the material from OCLC holdings
For Billed

Billed are the only records we have to retain in case the patron finds the missing material and returns it; only at this point will the patron’s record be released so they can order a transcript of their grades.

- In the item, change ICODE2 to u
- In the item, change STATUS to n
- In EDIT, add: n 500 San Antonio College Library no longer owns this book (or this volume, or this edition, etc.)
- Delete the material form OCLC holdings – the material is deleted from OCLC since it is no longer available for ILL
Volume and Date Forms, Abbreviations:

1 vol. only:
1 v.

Unknown number of volumes:
v.

vol. & year:
v.1 (1970)

vol. & issue no. & year:
v.1, no. 1 (1970)-
or
Vol. 1, no. 1 (1970)-

vol., issue no., month & year:
v., no. 1 (Jan. 1970)-

vol., issue no., month & year not from title page:
v.1, no.1 ([Jan. 1970])-new series, vol., date:
new series, v.1-May 1952-

closed series:

Vol. & date not from title page:
[Vol. 1, no. 1] (Jan. 1970)-

Vol. & date:

Particular number of volumes in set:
12 v.
As listed in items:
v.1 (1990)
v.2 (1991)
v.3 (1992)
v.4 (1993)
v.5 (1994)
v.6 (1995)
v.7 (1996)
v.8 (1997)
v.9 (1998)
v.10 (1999)
v.11 (2000)
v.12 (2001)

Particular edition:

2nd ed. (1990)

Particular edition & vol.:

23rd ed.: v.2 (1984/85)

Abbreviations:

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<td>Iss.</td>
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Cataloging Websites

Cataloger’s Desktop

http://desktop.loc.gov/signon.asp

The Cataloging Calculator

http://calculate.alptown.com/

Classification Web

http://classificationweb.net/

Library of Congress Online Catalog

http://catalog.loc.gov/

MARC Standards

http://www.loc.gov/marc/marcdoc2.html

Music Cataloging at Yale

http://www.library.yale.edu/cataloging/music/musicat.htm

OCLC Bibliographic Formats and Standards

http://www.oclc.org/bibformats/

San Antonio College Composer Cutter Table

http://hermes.sac.accd.edu/~jhammer/composer.html#A

Technical Services and the World Wide Web

http://www.library.ucsb.edu/untangle/scheschy.html

TexShare Texas State Library and Archives Commission

http://www.texshare.edu/

The Library catalogs all formats according to national standards. These standards include: machine readable cataloging (MARC) integrated format. Anglo-American cataloging rules, AACR2, and Library of Congress rules interpretation (LCRI). For the Library of Congress classification scheme and subject headings the library uses the http://classificationweb.net/ website. Cataloger’s Desktop http://desktop.loc.gov/signon.asp is also used for easy excess to heavily used cataloging publications.
Library Locations  Location; Millennium Code; Spine Label () location does not appear on label

CIRC  3rd floor N-Z, 4th floor A-M; ssta ();

REFERENCE  2nd floor; sref; REF

REFERENCE CD  2nd floor; CD-ROM’s & CD’s are filed in microfilm cabinet behind reference desk; srec; REFCD; accompanying book includes special label next to barcode

READY REFERENCE  2nd floor; srer; REF—with a yellow dot label typed Ready Ref, placed at top of spine

ATLAS SHELF  2nd floor, two atlas stands; srat; () orange dot label typed Atlas Shelf placed on top of spine

POPULAR  4th floor; sopp (); has a Gaylord white prepared label with blue print; POP Popular

JUVENILE  4th floor; schil (); has a Gaylord red label printed CHIL; also includes young adults

BOOKCASE  4th floor; sbke; BKSE

MCALLISTER  4th floor; smca; MCAL (includes all signed copies)

RESERVE  4th floor; different codes depending on amount of time ();

GOVERNMENT DOCUMENTS  3rd & 4th floors; different codes depending on location & type ();

DVD & VHS  3rd & 4th floors; different codes depending on format & location ();

AUDIO-VISUAL  3rd & 4th floors; different codes depending on format & location ();

PERIODICALS  3rd & 4th floors; different codes depending on format & location ();

Fixed Fields

The Fixed Fields are fields at the top of the OCLC bibliographic record. They are called fields because the length of the field does not change. Codes are used to describe the work being cataloged. Millennium has a small fixed field area with everything else appearing in the 008 field. Full explanations for Fixed Fields can be found at OCLC’s Bibliographic Format and Standards website http://www.oclc.org/bibformats/

The Fixed Fields are as follows:
Entrd: Date record edited M
Type: Type of record M
Bib lvl: Bibliographic level M
Govt pub: Government publication code M
Lang: Language code M
Source: Cataloging source code M
Illus: Illustration codes 0
Repr: Reproduction A
Enc lvl: Encoding level M
Conf pub: Conference publication 0
Ctry: Country of publication M
Dat tp: Type of date M
M/E: Main entry in body of entry 0
Fict: Fiction M
Bio: Biography M
Index: Index 0
Mod rec: Modified record code M
Festschr: Festschrift 0
Cont: Nature of contents 0
Desc: Descriptive cataloging form M
Int lvl: Intellectual level 0
Dates: Date 1, Date 2 M

M indicates that the information for this field is Mandatory.
A indicates that the information for this field is Mandatory if applicable. The information should be included if it is appropriate and the information is available.

O indicates that the information for this field is Optional.

**Fields and Indicators used at San Antonio College Library**

See OCLC’s Bibliographic Format and Standards website [http://www.oclc.org/bibformats/](http://www.oclc.org/bibformats/) for explanations on how the fields are used. All subfields and indicators are used bases on USMARC rules.

001 Control number – OCLC number

005 Date record used

007 Physical description – used for audiovisual materials only

008 fixed-length data elements

010 Library of Congress control number

020 International standard book number – if price is on the record, delete the price and subfield c.

022 International standard number

024 Other standard identifier – change to 020

050 00 Library of Congress call number -- all 090 are changed to this number

**Main entries**

100 personal name

110 corporate names

111 meeting names

130 uniform titles

**Title and title-related fields**

210 abbreviated title

211 acronym or shortened title
212 variant access title
214 augmented title
222 key title
240 uniform title
242 translation of title by cataloging agency
243 collective uniform title
245 title statement
246 varying form of title
247 former title or title variations

**Edition, Imprint, etc. fields**

250 edition statement
260 publication, distribution, etc. (imprint)

**Physical Description, etc. Fields**

300 physical description
362 dates of publication and/or volume designation

**Series Statements**

400 personal name
410 corporate name
411 meeting name
440 added entry –title
490 title

**Notes**

500 general note
504 bibliography not
Subject Access Fields

600 personal name
610 corporate name
611 meeting name
630 uniform title
650 topical term
651 geographic name
655 genre/form

***for books published in San Antonio always add a subject 651 0 San Antonio (Tex.) \v Imprints.

Added Entries

700 personal name
710 corporate name
711 conference or meeting name
730 uniform title
740 related title tracing

Series Added Entries

800 personal name
810 corporate name
811 meeting name
830 uniform title
856 electronic location and access
ON THE FLY RECORDS:

1. Only the first word in capitalized except for proper names and places.
2. Omit the first article of the title.
3. Use proper name authority (we have a large old catalog so this should not be a big problem).
4. Delete record when item is returned.

Creating “on-the-fly” records

When you scan a barcode and no item record is found, you will need to create one on-the-fly.

- Scan patron barcode as usual. Scan item barcode. You may be prompted for your initials/password. You will get a search box that says “Item on-the-fly” at the top:
Search by title, and select record that matches. If there is no record matching the book, create one by clicking the “New” button at the top, and filling in information as prompted (if you need to choose a bib template, select the sacbib template).

- After you've chosen or created a bib record, you'll be prompted to enter item record information.
  - If prompted to choose a template, pick the sacitm (SAC Item Defaults) template. If set up correctly, Millennium will choose the template and start asking you for info.
  - Location will usually be sta (SAC Stacks 3rd floor), which is the default in the sacitm template.
  - Price: In most cases, you won’t know the price. Just leave it as $0.00.
  - Call number: Enter call # using all capital letters (ex. PS3604 .A93, not ps3604 .a93)
  - Note: When prompted for “note”, enter your initials (this allows us to keep track of who is creating the original on-the-fly record. Cataloging will delete this later).
- The IMESSAGE field will be automatically coded ON THE FLY. Do not change this.

- Your on-the-fly item record will look like this:
• Save the record when you are done. At the "On-the-fly!" message box, click OK.

When the book is returned:

• When you check in an on-the-fly item, you'll get a message that says "On the fly."

![Message](image)

• First click on "Print this Message". Place printout in book.
• Then click "Yes" and finish checking in the item.
• Route book to the Cataloging Department. Place on the Reinstat shelf just inside the door to Technical Services.

NOTE: if the book is an Interlibrary Loan item, do not route to Cataloging.

Correcting “on-the-fly” item records:

Circulation will be routing books with on-the-fly item records to Cataloging after the book is returned. The following should be done:

• Make sure the on-the-fly record has been attached to the correct bib record. If it hasn't, transfer to correct record. There's also a slim possibility that the correct record is not in the catalog, and will have to be downloaded from OCLC.
• Change the IMESSAGE from ON THE FLY to - (NO MESSAGE)
• Make sure call number has been entered correctly.
• Add your initials in a note field.
• Make any needed enhancements to the BIB record too.
This is the information we send prospective distance cataloguers --

Some things you would need:

--A MARC editor. We use TLC's ITS for Windows, available on a thirty-day trial: http://www.itsmarc.com/

Click on "First Time Using ITS MARC?". This will give you the spiel for the demo and a temporary userid and password.

MarcEdit is a freeware MARC editor:

http://oregonstate.edu/~reeset/marcedit/html/tech.html

--An FTP client (such as WS FTP or SmartFTP) for downloading the PDF files from GLC's server. Freeware FTP clients are widely available.

--Adobe Acrobat Reader for viewing the PDF files. Freeware.

--Microsoft Excel for viewing the metadata spreadsheets, or other spreadsheet client capable of reading Excel (.xls) files.

--Access to LC Classification and DDC schedules

LCSH authorities and records are of course available online:

http://authorities.loc.gov/
The latter probably won't be too useful for the Canadian backlog. LAC's AMICUS is available for free (you have to register):
http://www.collectionscanada.ca/amicus/006002-124-e.html

LAC (formerly NLC) uses French forms of 710 for French language materials. Since the majority of our derives will be from them, we do the same for Canadian customers.

Library and Archives Canada's rule interpretations include a section on descriptive cataloguing notes that gives French equivalents of notes. Once you have found the note in English on this page:
http://www.collectionscanada.ca/6/18/s18-219-e.html you can click on "French" and get the French equivalent. This section of LAC's rule interpretationsgives a very good idea of where French cataloguing differs from English as far as access points are concerned.
http://www.collectionscanada.ca/6/17/s17-219-e.html

TLC's Cataloger's Reference Shelf is available online. This has several useful LC manuals, including MARC21, but not including LCSH, and LCC is available only in outline: http://www.itsmarc.com/crs/CRS0000.htm

If you are using TLC ITS or MarcEdit's Z39.50 client, the following pages will point you toward some potential servers:
http://staff.library.mun.ca/staff/toolbox/z3950hosts.htm
http://www.calstate.edu/uias/Z3950Hosts.shtml
Please note that there is quite a bit of outdated information on these pages. If you try a server and it doesn't work, ask <rich@slc.bc.ca>; he has a list of about 30 that he's used with varying degrees of success. For Canadian titles, in addition to AMICUS, he recommends the University of Toronto, McGill, the University of Alberta, and UBC. Université de Montréal and Laval are good for French (he has not been able to get into BNQ). If anyone finds any others that are particularly good, please let us know.

LC provides a Z39.50 Gateway to many libraries; unfortunately, you can only search them one at a time and (as far as I can tell) you cannot download the records. Still, here it is: http://www.loc.gov/z3950/

MARC Report is a program which may be downloaded for free trial for 30 days, and then purchased. It identifies errors in MARC coding, including wrong or missing subfield codes, items coded for illustrations or bibliography but lacking 300$b or 504, differences between the 008 date and the 260$c date, missing filing indicators (but watch for French "A" which it mistakenly thinks needs one).

http://www.marcofquality.com/soft/mrtdownload.html

Other free MARC Tools:
http://www.loc.gov/marc/
http://www.loc.gov/marc/marctools.html
http://www.ourmedia.org/node/57388

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Periodicals

Journal/Magazine Check-In Procedures

Things you will need:
You need access to Millennium Serials, a copy of the current invoice, a copy of the current annual renewal list, 1 black china marker, security tags, barcodes, and a library stamp with our mailing address. For journals and magazines with a glossy front cover attach a label with our mailing address.

Retrieve mail from Library Office. Arrange issues in alphabetical order. Only check in issues that are on the current invoice. Issues not on the current invoice are routed to departments or recycled.

Preparing Journal/Magazines to Check-In
Attach a barcode on the upper right side of issue or where you can find a blank space. Underline the title of the magazine/journal with a black china marker. If you have a title that contains more than one word underline the first word only except for ‘A, An, The’. Stamp the lower right side of the issue’s front cover with our mailing address or attach a label with our mailing address when you have a glossy front cover. Attach a security tag on the centered bottom of the last page or where you can find a blank space.
Locate the publication information found within the first few pages or toward the end. Circle the date, volume, and issue number. Do not circle the publication information if it can only be found on the front cover: stamp the bottom or top of the table of contents page or the page that contains the publication information depending on blank space available.

After you circle the publication information, set the issue down with that page open. You will need this information as you are checking-in the issue on millennium. Make sure the date of the periodical, volume, and issue number match up with the check-in card on millennium.

**Check-In**

Access Millennium Serials. User name and password: sacser

To set the accounting/serial unit for this session enter initials and password assigned.

Search by title or by ISSN to locate the record. Open the check-in card so the next current issue is highlighted and ready to check-in. Before clicking on check-in, make sure the highlighted issue on the check-in card matches with the issue in hand. (If it does not match, update the check-in card by right clicking, select’ box menu,’ and select’ update boxes as a group.) When you see ‘edit data’ click next, scan barcode, and save. After completing these steps continue to the next magazine.

**Template**
Click on ‘admin’, ‘settings’. Click on ‘item’ and select sper SAC periodicals item.

**Supplements/Special Issues**

Follow check-in procedures listed above, and inter-file within designated subscription titles.

**Trouble Shooting**

The majority of our subscriptions are ordered from EBSCO. When duplicate, missing or damaged issues occur, claim online through EBSCO. If subscription is on direct order, then the claim must be made with that company directly.

**Circulation Time**

The time periodicals are kept in circulation differs depending on frequency and what the holding statement says.

**Weeding Collection**

Individual issues of magazines/journals are weeded and recycled depending upon the amount of time they are held (i.e.) 1 year. Records are updated as needed to reflect what is in the collection.

**Withdrawing Collection**
Refer to Millennium for information on when to withdraw periodicals. Delete the boxes of issues from the check-in card including the item record attached. Records are updated as needed to reflect what is in the collection. Periodicals are brought down to Technical Services. Bound volumes are stamped with a withdrawn stamp and boxed for district pickup. Issues of magazines/journals are recycled.
FEDERAL DEPOSITORY COLLECTION DEVELOPMENT POLICY

CHRISTINA H. PETIMEZAS 11/6/02

FEDERAL DEPOSITORY COLLECTION

GENERAL OBJECTIVES

To support the San Antonio College curriculum, materials will be acquired to keep the collection current on new theories and techniques in the field reflected in the curriculum, while maintaining the depository under the rules governing the federal depository program.

SELECTION PRIORITY

1. Those items which meet direct curriculum needs of courses offered to the student body, as listed in the San Antonio College Bulletin. Such curriculum needs include instructional programs in liberal arts and science education, occupational and technical education, developmental education, continuing education, and women’s programs. A list of suggested subject areas/SuDoc numbers is given below.

2. Those items which are listed in the Guidelines for the Depository Library System.

3. Those items which meet other needs of the student body, faculty, administration, and community, dependent upon relevance of the items to the curriculum, internal factors of space and budget limitations, and other collections available in local depositories. A list of selection criteria is given below.

4. While recommendations are welcome, final responsibility for selection of materials rest upon the Federal Documents Librarian.

5. Most documents will be housed in the Documents area of Special Collections. Major reference works will be routed to the Reference collection; periodical documents, with a biannual publishing frequency, will be routed to the Periodicals collection.

MATERIAL TYPES
All formats may be considered for acquisition. Serials are heavily relied upon for current material. Textbooks provide background information. Audiovisual materials may be added for selective additions, as well as CD-ROMs, DVDs, and microfiche.

SELECTION CRITERIA

1. Course and curriculum descriptions in the college bulletin.
2. Expressions of research needs, such as term paper requests, reference requests, and subjects of topical and geographic interest.
3. Strengths, needs, and gaps in the entire library collection.
5. Format, level, and frequency of publication, such as weekly publications of office manual types, and highly technical scientific items.
6. SuDocs in which everything available should be selected:
   a. CR
   b. GPO
7. Areas in which some, but not all, materials should be selected:
   a. A
   b. AA
   c. AE
   d. C
   e. CC
   f. D
   g. E
   h. ED
   i. EPA
   j. FEM
   k. FT
   l. GA
   m. GS
   n. HE
   o. HH
   p. I
   q. IA
   r. IC
   s. J
   t. JU
   u. L
   v. LC
   w. MS
   x. NASA
   y. NCU
   z. NF
   aa. NS
8. Areas of highly technical nature or which are located in other local depositories and are not selected:
   a. NTIS
   b. Military manuals
   c. FHL
   d. FMS
   e. FTZ
   f. ITC
   g. LR
   h. NMB
   i. OP
   j. RR
   k. TC
   l. Serial set

SELECTION TOOLS

Materials will be identified through recommendations in or from:

Faculty and student recommendations

Guidelines for the Depository Library System

Monthly catalog


RETENTION POLICY:

Documents will be weeded based upon the following criteria:

2. Curriculum needs.
3. Historical importance, including appearance in standard reference sources and bibliographies.
5. Availability of newer similar works.
6. For scientific or technical material, documents older than five years should be reviewed for dated material.
7. For nominations, keep only Department Secretaries, well-known and/or controversial figures, and Texas nominees, placing on exchange all other nominations older than five years.
8. For budget material, place on exchange anything older than five years.
GOVERNMENT DOCUMENT PROCEDURES

San Antonio College Library is a selective federal government document depository. We have been a depository since 1972. We receive our government documents in shipment boxes via UPS from Washington, DC.

SHIPMENT BOX PROCESSING

1. Receive and open shipment box.
2. Separate government documents from shipping lists.
3. Stamp current date in the upper right hand corner of shipping lists.
4. Check shipping lists against item numbers notebook and place a mark beside the item numbers we receive.
5. Process the government documents:
   a. Stamp the ownership and date stamp on the lower left hand corner.
   b. Write the classification number on the first inside page of the document in the upper left hand corner.
   c. Place a barcode on the back cover in the lower right hand corner.
   d. Place security tag and book pocket in the middle of the inside back cover.
   e. Exceptions:
      1. If the document has a shiny cover, place a white label with the ownership and date in the lower left hand corner.
      2. If there is no space on the inside back cover, place security tag and book pocket on the first blank page in the front of the document.
      3. On the one sheet documents and pamphlets, there will be no space for the book pocket. These documents will go in envelopes when they are cataloged.
6. Place completed shipping lists with date stamped in current shipping list folder.
7. Show government documents technician completed documents so that she may remove any documents that are to be placed in the Reference area.
8. Take the remaining documents to a computer with Internet access, log on to the GPO bookstore, www.bookstore.gpo.gov to price the documents by searching the title in the title index.
9. Place index card in the book pocket with the price or if it is does not have a book pocket, a post-it note. If no price is listed, use $10.00 for the document.
10. Shelve on new document shelves waiting for Marcive printout.
1. Load computer file from Marcive of new documents that were received from the previous month onto Millennium on the 15th of each month.

2. Create a review file of the new documents in Excel:
   a. Create list in Millennium.
   b. Export list
      1. Click on “Export Records”
      2. Select fields
   c. Change field delimiter to a ‘^’ symbol.
   d. Designate a file destination (somewhere on C:drive)
   e. Open Excel.
   f. Import file
      1. Click Data>Import External Data>Import Data and select file
      2. Under “Original data type,” change it to “Delimited” and click Next
      3. Under “Delimiters” change it to Other and put the ‘^’ in the box and click Next
      4. Then click “Finish,” then “OK”
      5. Data has been imported.


4. Copy catalog paper documents
   a. Item record
      1. Change call number field from 086 to 050
      2. Scan in barcode from back of document
      3. Add note field for date record was loaded
      4. Place price of document in price field. If no price is found, use $10.00
   b. Bibliographic record
      1. Delete second SuDocs number |c 086 0, leave |g 086 0
      2. Check Superintendent of Documents number
      3. Check pagination
      5. Check subject headings
      6. If the record contains a URL, be sure there is a |n 530, “Also available via
         Internet from the ... website, and add a |y 856 41 |uhttp ...
   c. Place red dot on the lower right hand corner of book pocket to indicate it has been priced. If there is no book pocket, place red dot beside the barcode.

5. Copy catalog maps
   a. Item record
      1. Change call number field from 086 to 050
2. Scan in barcode from back of document

3. Add note field for date record was loaded

4. Place 5 in I Code field to indicate it is a map

5. Place price of document in price field. If no price is found, use $10.00

b. Bibliographic record

1. Change Mat Type from a to e

2. Delete second SuDocs number |c086 0, leave |g086 0

3. Check Superintendent of Documents number

4. Add GMD after main title, |a[map]

5. Check pagination


7. If the record contains a URL, be sure there is a |n 530, “Also available via Internet from the ... website, and add a |y 856 41 |uhttp ...

c. Place red note to indicate it has been priced beside the barcode.

6. Copy catalog videos

a. Item record

1. Change call number from 086 to 050

2. Scan in barcode from inside of video case

3. Add note field for date record was loaded

4. Place 7 in I Code Field to indicate it is a video

5. Place price of document in price field. If no price is found, use $10.00

6. Change location to ssvid

b. Bibliographic record

1. Change Mat Type from a to g

2. Delete second SuDocs number |c 086 0, leave |g 086 0
3. Check Superintendent of Documents number
4. Add GMD after main title, |h[videorecording]
5. Check pagination
7. Check subject headings
   c. Place red dot on the lower right hand corner of book pocket to indicate it has been priced.

7. Copy catalog electronic resources, CD-ROMS/DVD-ROMS
   a. Item record
      1. Change call number field from 086 to 050
      2. Scan in barcode from the inside of DVD case
      3. Add note field for date record was loaded
      4. Place 11 in I Code field to indicate it is an electronic resource
      5. Place price of document in price field. If no price is found, use $10.00
      6. Change location to ssccd for CDs and ssvid for DVDs
   b. Bibliographic record
      1. Change Mat Type from a to m
      2. Delete second SuDocs number |c 086 0, leave |g 086 0
      3. Check Superintendent of Documents number
      4. Add GMD after main title, |h[electronic resource]
      5. Check pagination
      7. Check subject headings
   c. Place red dot on the lower right hand corner of book pocket to indicate it has been priced.
8. Copy catalog E-Books

a. Item record
   1. Change call number from 086 to 050
   2. Add note field for date record was loaded
   3. Place 18 in I Code field to indicate it is an E-Book
   4. Change location to sgdn

b. Bibliographic record
   1. Change Mat Type from a to n for E-Books
   2. Delete second SuDocs number |c 086 0, leave |g086 0
   2. Check Superintendent of Documents number
   3. Check pagination
   5. All electronic only need two notes added or corrected
      a. |n 538 Mode of access: lists old URL; current access available via
         PURL. Note: there is always a space before and after the semicolon
      b. |y 856 41 |uPURL
      c. If the PURL contains instructions, add |z: |zlink to document from list
         |uhttp://purl.access.gpo.gov/GPO/LPS.... Note: there are no spaces
         anywhere in this line
   6. Add GMD after the main title: Hearings on H.R. .... |h[electronic resource]
   7. Check subject headings

8. Copy catalog E-Periodicals

a. Item record
   1. Change call number field from 086 to 050
   2. Change the class number to E-Journals
3. Add note field for date record was loaded

4. Place 1 in I Code field to indicate it is a serial

b. Bibliographic record
   1. Change Mat Type from a to n for E-Books
   2. Check Superintendent of Documents number
   4. Check subject headings

c. Checkin record
   1. Click view to show bibliographic record in Millennium
   2. Highlight URL and right click for copy command
   3. Click summary, checkin, attach new checkin
   4. Click next, next, checkin card
      a. Items on 1 instead of 24
      b. Delete date, volume, issue, issues, days, unit
   5. Paste URL into checkin record
   6. Delete checkin box in checkin record
   7. Delete URL from bibliographic record if SAC is the only location

LIBRARY OF CONGRESS CLASSIFICATION NUMBER LABELS

1. All federal government documents are being integrated into the circulating and
   reference collections of the library.

2. Produce labels using Microsoft Word
   a. Format the 8 ½ x 11 sheet of labels and use labels ¾ x 2 ½
1. Prepare 3 newspaper columns

2. Need the width of columns to be 0.843

3. Need the space between columnsto be 0.500

3. Label recent paper documents
   a. Trim class number label to fit in upper left hand corner of document
   b. Place label lock over label to secure it to the document

   Label older paper documents
   a. Cover older class number with a white label to fit in upper left hand corner of document.
   b. Trim new class number label to fit in upper left hand corner of document
   c. Place label lock over label to secure it to the document

5. Label one sheet and pamphlet documents
   a. Trim class number label to fit in upper left hand corner of document
   b. Place label lock over label to secure it to the document
   c. Place document in clasp envelope
   d. Produce another class number label
   e. Attach label to upper left hand corner of envelope and place label lock over label to secure it to the envelope

6. Label CD-ROMS, DVD-ROMS, and Videos
   a. Trim new class number label to fit in upper left hand corner of document
   b. Place label lock over label to secure it to the document
   c. Send to Bindery Technician to have additional class number label placed on the spine of DVD and/or Video case.
WITHDRAWNS

1. Federal government documents need to be kept 5 years before the items can be withdrawn. Some documents will be kept more than 5 years because of historical value or they support our curriculum.

2. Withdrawing documents only SAC owns
   a. Item record
      1. Place w in I Code 2 field
      2. Place w in Status field
   b. Bibliographic record
      1. Place n in Suppress field

3. Withdrawing documents with multiple locations
   a. Item record
      1. Place w in I Code 2 field
      2. Place w in Status field
   b. Bibliographic record
      1. Add note “San Antonio College Library no longer owns this document”

4. Withdrawing documents with web access
   a. Item record
      1. Place w in I Code 2 field
      2. Place w in Status field
   b. Electronic item record
      1. Add 050 field for class number
      2. Add initials of person changing record
      3. Change location to sgdn
4. Place 18 in I Type field

c. Bibliographic record
   1. Change Mat Type from a to n for E-Books
   2. Place |h subfield “electronic resource” in title field
   3. Change 530 to 538 and change “Also available” to “Mode of access”

5. Withdrawn documents need to be counted and stamped withdrawn on the top of the documents.

DISPOSAL LISTS

1. There are three types of disposal lists: paper, microfiche, and non-print.

2. Preparing disposal lists
   a. Information needed for lists
      1. Name of library
      2. List number
      3. Format of items listed
      4. Address of library
      5. Telephone and fax number of library
      6. Contact person
      7. Email address of contact person
      8. Special notes, e.g. postage requested, etc.
   b. Column placement for lists
      1. Class number begin at 1
      2. Title begin at 21
      3. Year of publication begin at 60
3. Disposal dates are assigned on the date of arrival. If the lists are received by the 15th of the month, they are assigned a date at the end of the following month. Lists received after the 15th of the month, will receive a date at the end of the next month.

4. Lists will be sent via email to the Region II regional depository librarian at the Texas State Library and Archives Commission.

5. After the disposal date has passed, documents can be placed in the recycling bins for pickup.

MISCELLANEOUS DUTIES

1. Federal government documents that are placed in the Reference collection.
   a. Code of Federal Regulations
      1. Keep current year only of this series
      2. Place label “KF70 .A34” in upper left hand corner of front cover
      3. Stamp ownership and date in lower right hand corner of front cover
      4. Print “Scan Main Volume of This Title” in the lower left hand corner on the back of document
      5. Replace prior year’s editions with the current year in the Reference area
   b. United States Code
      1. Place class number on title page of document in the upper left hand corner
      2. Stamp ownership and date in lower right hand corner of title page
      3. Route to Technical Services for processing
   c. All other Reference books
      1. Place class number on title page of document in the upper left hand corner
2. Stamp ownership and date in lower right hand corner of title page

3. Route to Technical Services for processing

2. Items on order printout
   a. Retrieve the items on order printout from the FDLP website,
      www.gpo.gov/su_docs/fdlp/tools/itemlist.html
   b. Check printout against items on order notebook twice a year to scan for any
      additions or deletions to the items on order.
   c. Make changes to items on order notebook

3. Administrative Notes Technical Supplement
   a. Check supplement for any corrections to class numbers, item number additions
      and/or changes.

COMPUTER RESOURCES

4. Current shipping list numbers for that week –
   www.fdlp.gov/collections/distribution/95-slists
8. Announcements from the Federal Depository Library Program –
   gpo-fdlp-l.listserv.access.gpo.gov
   doctech-l@lists.usu.edu

10. Texas State Library Electronic Disposal List Service –
    www.tsl.state.tx.us/ref/fdlp/index.html
Bindery Procedures

Repair of books and magazines.

Books that are beyond repair:

- Investigate if the book can be reordered.
- Let the collection manager know.
- If it can be reordered, inform the acquisitions department to order the book.
- If the book is out of print then the book goes back to cataloging to be withdrawn.
- Once the book is withdrawn from Millennium, the book is then stamped with a withdrawn stamp and boxed to be taken to district.

Hard cover books that have spine damage:

- Check Millennium to make sure the location of the book is bindery(sbnd).
- Next, clean off old glue if possible with special X-acto knives.
- Then, glue the spine back in place by spreading a thin coat of Elmer’s glue on the spine.
- Next, place stripes of wax paper at the beginning and end of the book.
- Then, place the book on the press for a day or two until the glue dries properly.
- Once the book is repaired change location to available in Millennium.
- Finally, place the book on a book truck by the door to tech. services to be taken to its appropriate place.
- Books that are in need of professional binding get sent to HF Group Binding Co.
- If there are periodicals route to Linda Casas who will send them send them to HF Group Binding on a separate order.

Books that have pages torn out:

- First, check on Millennium to make sure the book location is Bindery(sbnd).
- Clean off any old glue or remnants of existing page with an x-acto knife.
- Place glue at the appropriate place.
- Spread it evenly with a brush and place the pages back in place.
- Place wax paper in between the pages to prevent them from gluing to each other.
- Then place the book on a book press for a day or two to allow the glue to dry properly and adhere to the repaired page.
- If the books pages are torn out and the cover is damaged as well either velo-binding, or presentation binding is used.
- Finally, change the location to original location in Millennium.
Velo-Binding material:

- First, check on Millennium to make sure the document location is Bindery(sbnd).
- Next, take the document and detach the cover using an x-acto knife.
- Take the pages of document out carefully and in order.
- Place the cover and pages of the document in velo-Bind 323 in stacks of 5-6 pages.
- Punch customized holes into documents.
- After all pages have customized holes; insert velo-Bind spine and insert all document into special notches, close lid.
- Finally, change the location of the book back to original location in Millennium.

Presentation Binding:

- First, check on Millennium to make sure the document location is Bindery(sbnd).
- Next, take the document and detach the cover using an x-acto knife.
- Take the pages of document out carefully and in order.
- Place the cover and pages of the document in docubind P100 in stacks of 5-6 pages.
- Punch customized holes into documents.
- After all pages have customized holes; insert pages into WilsonJones CB256 along with selected presentation reliure ring.
- Place pages together.
- Finally, change the location of the book back to original location in Millennium.

Books that are damaged with torn spines, or extensive cuts:

- First, check on Millennium to make sure the location of book is Bindery(sbnd).
- Next, determine the amount of damage.
- If the book cover does not have extensive damage, a small amount of book tape is used to repair the damage.
- If the book cover or spine is extensively cut, the book cover is completely redone with book tape.
- Next, make a new title label to be placed on the spine of the book.
- Then, place a protective cover using 4” tape over the new label.
- A new call number label is made using Corel WordPerfect8, and is placed ¼ to ½ inch from bottom of the spine.
- A label lock is used to protect the new label.
- Finally, change the location back to original location in Millennium.
Books that are missing pages:

- First, check on Millennium to make sure the location of book is Bindery(sbnd).
- Fill out an Interlibrary Loan Request form for the whole book, or if you are sure of the edition, for the missing pages. (See Attachment A) Route paperwork to Ill department.
- Once the books from other colleges come in, make copies of the missing pages.
- Then, cut the pages down to the size of the damaged book.
- Glue the pages in the appropriate place.
- Then place wax paper in between the pages to prevent them from gluing to each other.
- Next, place the repaired book on the book press, until glue dries properly (24-48 hours).
- Change the location back to original location in Millennium.
- Finally return the other colleges books to the ILL department.

Books that have damaged corners:

- First, check on Millennium to make sure the location of book is Bindery(sbnd).
- Place precut book tape on the corner to repair this damage.
- Finally, change the location back to original location in Millennium.

Books that have markings on pages:

- First, check on Millennium to make sure the location of book is Bindery(sbnd).
- A book cleaner is used to clean any scuff marks.
- If the book has extensive pencil markings, an eraser is used to remove them.
- Finally, change the location back to original location in Millennium.

Magazines pages that are loose or have been pulled out:

- First, check on Millennium to make sure the location of book is Bindery(sbnd).
- If the magazine is held together with staples, remove the staples.
- Then, put the pages back where they belong in order and re-staple them together.
- If, the magazine is glued together apply glue with a glue stick along the edge of the page or pages and place them back in the magazine.
- Place strips of wax paper between glues pages to ensure the pages do not glue to each other.
- Finally, change the location back to original location in Millennium.
Books that have the wrong call number or missing labels:

- First, check on Millennium to make sure the location of book is Bindery(sbnl).
- Next, check on Millennium to get the correct call number.
- Using Corel Worldperfect 8, open label file. Correct dimensions are as follows: sheet size 8.5x11, label size 1.38x1.5, number of labels 5x6, space between columns .125, space between rows .125
- Center the new label.
- When finished print out.
- Place label ¼ to ½ inch from bottom of spine.
- Place a label lock over label.
- Finally, change the location back to original location in Millennium.

Repair CD’s and DVD’s

- If disc is scratched place item in Disc-Go-Pod machine.
- Follow manual instructions.
- If disc is scratched beyond repair ask collection manager if item needs to be reordered.
- If it can be reordered, inform the acquisitions department to order the disc.
- If the disc is out of print then the disc goes back to cataloging to be withdrawn.

Processing Books

- First, double check with Millennium for the correct call number.
- Next, create the new labels using Corel Wordperfect.
- Then, stamp the book on the inside front cover, bottom of page 31, and on the top on the book with SAC Library stamp.

[SAC LIBRARY]

- Stamp the title page with the ownership stamp which includes the address.

[SAN ANTONIO COLLEGE LIBRARY
1001 Howard St.
San Antonio, TX 78212]

- Next, place a call number labels on the spine of the books.
- Place a label lock over the label.
• Finally, place the finished truck of books by the door to be collected from the circulation department.
• If the book truck belongs to reference, route back to the cataloging technician.

Books that have correct labels:

• Stamp the books on the inside front cover, title page, page 31, and on the top of the book spine with the ownership stamps (see above example).
• Once book truck is finished being stamped, place the book truck by the Tech. Service door to be taken to its appropriate place in the library by the circulation department.

Reference books:

• First stamp the books with the ownership stamps on the inside front cover, title page, page 31, and on the top of the book spine (see above examples).
• Next make sure the correct call numbers are on the books.
• Remove labels and create new ones with REF typed at the beginning of call number.
• Place a security tag that is specifically intended for REF. books on back cover of the book.

Books that have no record in Millennium:

• Once this problem is identified, give the book to Cataloging Technician.

Children Books:

• First stamp the books with the ownership stamps on the inside front cover, title page, page 31, and on the top of the book spine (see above example).
• Next make sure the correct call numbers are on the books.
• Place a child label on the top of the spine.
• Place a label lock over child label.
• Place a security tag behind the book pocket.
• Finally, place the book truck by the Tech. Serv. door to be taken to its appropriate place in the library by the circulation department.

**Popular Books:**

• First stamp the books with the ownership stamps on the inside front cover, title page, page 31, and on the top of the book spine.
• Next place a plastic protective cover over the book jacket of the popular book.
• Make sure the correct call numbers are on the books.
• Place a POP label on top of the call number label.

• Place a security tag behind the book pocket.
• Place the book truck by the Tech. Services door to be taken to its appropriate place in the library by the circulation department.

**Paperback Books:**

• First, a hard clear plastic cover is placed over the material and cut down to the covers size.
• Then, two inch clear tape is placed on the front and last page of the material.
• Place ownership stamps on front inside cover, title page, page 31, and top of the book spine (see above examples).
**CDs and DVDs:**

- If the CD or DVD does not have a cover for the case, it is scanned, printed, cut to case size and placed inside the case cover secured by double stick tape to display what is in the CD or DVD cases.
- Place book pocket, security tag and barcode on inside case.
- Create the correct ownership information using the Avery Design Pro program, this is placed on the actual CD or DVD disc.
- Finally, place spine and the ownership labels on the CD or DVD cases and send the truck to circulation or reserve.

**Ordering Supplies**

**Ordering Supplies:**

- As bindery materials are used up or supply gets low, keep a list of items that need re-ordering.
- Next, price check in Brodart and Gaylord for the material.
- Collect a price quote for the material using a price quote template saved in Word. (See Attachment B)
- Print out price quote.
- Create a fax cover sheet (See Attachment C) for either Brodart or Gaylord.
- Send Fax quote to Brodart or Gaylord for final verification.
- When quote arrives from Brodart or Gaylord route information to Juanita to prepare a requisitions.
- When material comes in, place material away in appropriate place.
Request for Quotes

Alamo Community College District
Department

Name/Title: ____________________________ (Ref: ____________________________)

Tel: __________________ Fax: __________________

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>QTY</th>
<th>U/L</th>
<th>PART NUMBER</th>
<th>UNIT COST</th>
<th>EXTENDED COST</th>
<th>*FREIGHT CHARGE</th>
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<td>8 Inside Delivery (Indicate Charge) Delivery Zip Code</td>
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DELIVERY: ________________ ARO ________________ TOTAL: ________________

* Please show a Freight Charge on each item if not included in the unit price. Quotes including freight are awarded to low bid on each item. ("All or nothing" bids are not accepted.) ACCD reserves the right to request certificate of insurance -- General Liability, Auto and Workers Compensation for on-site services RFQ.

VENDOR NAME: ____________________________ QUOTE #: ____________________________

VENDOR CONTACT: ______________________ SIGNATURE ________________________

DATE: __________________

PRINTED NAME: ______________________

Please direct questions to ______________________ at (210) _____________. (e-mail ______________________@ACCD.EDU)

FAX your quote to: (210) _____________, Attn: ______________________ by: ______________________

Thank you for your quote!

April, 2006
COLLECTION MANAGEMENT

Collection Management

I. BUDGET
   A. Creating a new fiscal year budget
   B. Apportioning the budget
   C. End of fiscal year budget

II. UPDATING THE COLLECTION
   A. Maintaining the Collection Development Guide (Your Little Book of Collection Development)
   B. Maintaining Policies
   C. Liaisons and liaison surveys
   D. Missing/Billed/Lost & Paid

III. WEEDING THE COLLECTION
   A. Inventory
   B. Utilizing the CREW Method
A somewhat tongue-in-cheek guide to the collection management policies and procedures at San Antonio College. No animal was harmed in this endeavor.

YOUR AUDIENCE

According to the President at the 8/19/02 Convocation, your audience consists of mostly remedial students, not graduate level by any means. Our library collections are substantially geared to student and curriculum needs, as well as faculty, staff, administration, and community needs. Try to avoid upper division, faculty, public library, and general books, unless the demand for the subject is overwhelming. Try to concentrate on two-year technical, lower division, and academic titles.

Outside recommendations are encouraged but don’t sit around waiting for them! Trying to wring out meaningful recommendations from your liaison departments is a vital part of your partnership with them. Note the word ‘meaningful’; if the recommendation does not fit your Collection management policy, all of which are available online, you may respectfully decline the acquisition. Be especially cordial if the department needs remedial material—remember the President’s words and buy it! Departments wanting to purchase material for their curriculum have to purchase such things from their own funds, although our Acquisitions Specialist would be happy to help them order from Baker & Taylor.

Recommendations from other librarians are also encouraged. If you feel the material does not fit your collection, please notify the other librarian as to your reasons. “I hate your guts and your mother dresses you funny” may be a valid reason, of course. If they still insist on purchasing the material and offer to pay for it, I personally, would take the money and run.

HOW TO RECOMMEND

The best way to recommend material is to use Baker & Taylor’s Title Source 3 (TS3) system. The URL for TS3 is: http://academiclibrary.btol.com/
Your logins are sacsatx3/rope3, sacsatx4/rope4. The cart you build in a particular login will stay in that login, so if you can't find your cart in one login, check the other before panicking.

Once you logon to TS3, you may search by author, title, subject, or ISBN, among other ways. When you find a title you want, go to Carts and select a new cart. Please give it a unique name, such as your fund code and a date. If you are using more than one fund code, call it after yourself. For example, if I were adding titles to the parapsychology collection, I would use my code, CUS[date], for Parapsychology, first cart. If I were using more than one fund code, I would call the cart Moby—just kidding—I would name it chp[date]. You would then indicate in the note field which fund code to use in the purchase of that particular title. Also use the note field to indicate if you want the title to go to a particular area, such as Ref. Titles over $100.00 always go to Reference or to Bookcase, so please indicate where you want these pricey titles to go or consider buying it in NetLibrary if available there. Go back to the title you want and type the quantity in the quantity field. Then click update. If you decide, “Oopsy, I already have 13 copies of this dumb book” and you want to delete the title, you have to hit the blue title field, then hit delete. Use the note field to specify other types of fund codes, especially REF FUNDS or GEN, or if you want the material located in a special collection. When you are ready to send your cart out into the world, hit transfer. You will be given an extremely short list from which to select: Acquisitions or Collection Manager—select Collection Manager and then the word add. Then, you can safely transfer. You may choose to keep your card or delete your cart or print your cart out or spit on your cart at this point. The Collection Manager will not be keeping a copy of your cart because she has carts of her own to keep. Be warned! At the beginning of the next fiscal year, you will be asked to delete last year’s carts


Now for the fossils among you who refuse to use TS3, you may use Amazon or BIP, but (have I mentioned this before?) be sure and include the ISBN. Since you are including the ISBN, why not just perform an ISBN search on TS3 and make life easier for those around you?

LOCATION, LOCATION, LOCATION

The amazing and short-tempered Acquisitions staff has requested that you color code your location requests if they fall outside of circulating areas and you are, of course, working with paper. Do not colorize your computer! Please color code the title of the work as follows: yellow is for reference and orange is for special collections. I will give you the appropriate marker to keep as your very own if you cannot afford to buy one. Special collection materials include titles worth $100.00 and over—however,
after our discount from B&T, the title may no longer cost us $100.00 and over, in which case the title will be circulated unless you strongly recommend otherwise. If an author comes from San Antonio or if the material is about San Antonio, route the work to the McAllister collection. If the book is not too expensive, you might want to purchase an additional circulating or reference copy at the same time. When the circulating copy goes missing—and they do, boy do they—we will still have our McAllister copy. Such an example is the Ghosts of San Antonio series, which periodically disappear from Reference (pun intended).

FUND CODES

You have your own funds to spend, of course, based on the following formula, created by the legendary John Hammer and modified by the semi-lucid Christina Petimezas:

\[ \%FAC + \%STU + \%COST/TITLE + \%FY\ ALLOCATION + \%CIRC / 5. \]

For the curious, here are the elements of the formula means:

\% full time faculty members in a department or program
\% students who have declared a major
\% cost of titles includes the average cost spent in last year's fund code
\% fy allocation means how much money your fund code had last year
\% circulation includes usage in both reference and circulating areas; as special collections convert to LC, these statistics will be added.

Students who had declared Liberal Arts as a major were divided among 11 disciplines. Students who had declared Technical Studies as a major were given to Engineering.

Beside your pathetic little funds, we have other funds you may grovel for: if a reference title costs over $150.00, you may put REF FUND on your recommendation or cart. If a non-reference title costs over $150.00, you may put GEN on your recommendation or cart. If the title you want is a work concerning
your particular area, such as “Handling Abusive Patrons with Bold Knife and Fork,” you may use GEN or you may request the librarian handling the Zs to purchase it (hint, Tina Petimezas, fund code LIB). Also, if you want to re-order a missing or heavily circulated item, use GEN. If you want to order a book that you consider ‘popular’ such as something from the New York Times bestseller list, just put POP as the fund code.

Replacements: if an item is missing, billed for a significant length of time, or lost & paid, Acquisitions will automatically replace it, using the GEN FUND.

**WORDS OF WARNING**

When you are ready to route recommendations to me, please add your fund code, your initials, and any special colors. Then, lovingly place the recommendations in the REF. RECOMMENDATION or CIRC. RECOMMENDATION mailboxes in Technical Services. You may also use the Recommendation mailbox in the Library Office if you are too decrepit to make it all the way into Technical Services. **DO NOT, I REPEAT, DO NOT PUT THESE RECOMMENDATIONS IN MY PERSONAL MAILBOXES!!!** Also, please keep them divided as to location: reference and special collection or circulating—these includes all AV and non-print materials. Also, **all the librarians agreed that all recommendations must go through the lovely and obedient Collection Manager.** It doesn’t do you any good to bypass the obedient and lovely Collection Manager because the ever-alert, sometimes short-tempered Acquisitions staff always presses upon her the material you’ve tried to slip by her.

If you want these bits of paper back, please arrange this with Pat. However, why not input the ISBNs into a TS3, then you have your own record?

If you recommend works over $200.00, be prepared to prove its worth by finding glowing reviews—unless the material is from **Gale.** Gale stuff always gets good reviews anyway, so don’t waste your time finding one.

**NEW EDITIONS AND SUPERSEDED STUFF**

As you peruse review journals please keep your eyes open for newer editions. All older editions will be automatically withdrawn when a newer edition is cataloged.
If the title seems to be a **CONTINUATION**, you will be given the choice of adding it to the Continuations list and never having to pay for it yourself. Continuations need not be annual—they can be bought every other year, every third, fourth, or even fifth year. They will be bundled off to Baker & Taylor’s Standing Order list. Of course, every five years, there is a gigantic **bloodbath** of Continuations, with every librarian voting on whether to retain individual titles or not. Titles with little or no use are ruthlessly cut down, and serve ‘em right. If titles are contained in one of our online collections—Opposing Viewpoints, Oxford, or Gale, they will not be duplicated in paper.

**REVIEW MATERIALS**

The following review materials are made available unto you:

- **Choice** online: **Choice** is especially good about letting you know the **audience level**. You can create a list which you can email directly to me or use to create a TS3 cart.

- **Booklist** online: You can create a list which you can email directly to me or use to create a TS3 cart.

- **Library journal** online: Unfortunately ALA has not published this journal with email/lists options, so you’ll have to use the ISBNs to create a TS3 cart or print out recommendations as you go through the journal.

- **Texas Books Review** and other Texas publishers’ catalogs: checked and routed to the librarians whose areas are covered within.

- Other publishers’ catalogs: housed in Technical Services. If you want to borrow one, please sign it out and back in under ‘Other’ on the sign-out sheet, then please refile it when you are finished, unless you want to order something from it. All are stamped with the date of receipt.
Publishers’ notices and brochures: these are usually placed in your mailboxes. There is a handy waste receptacle under the table for your convenience in filing these. Also stamped with date of receipt.

LIAISON OR YOUR PARTNERS IN CRIME

You are assigned a department or program corresponding to your subject area. Please try and meet with the Department/Program Chair at least once a year. If you can drag a corresponding liaison from the department/program, even better. Some brave and legendary librarians have asked to meet with the entire department/program all at once. This is especially difficult when the department/program never has a meeting, of course.

In order to drag recommendations out of the department/program, some librarians have sent all publishers’ brochures to them. This is a Bad Thing, as the material is bought regardless of level or need. It would be a Good Thing to only send the appropriate materials to them after you have vetted them. This is not ‘censorship’ but ‘pre selection.’

You are encouraged to notify the department/program of the materials purchased in their area. Notifying them that the web New Titles list has been updated and what their LC numbers are would be one way to achieve this goal.

In order to keep track of liaison activities, you are required to fill out an annual Collection Development Survey for the current fiscal year. It is especially important to keep track of accreditation activities; please contact the chair a year before the activity is due in order to beef up the area if necessary, and some extra monies will be scraped up for you.

Finally, never ever ever tell your department how much money has been assigned their area. It will always be too much or too little for their taste. If too much, they tend to overbuy in non-community college level areas. If too little, they don’t realize we can usually find money to purchase a needed item even if the librarian has run out of money in that particular fund.
EXPENDITURES AND MONTHLY REPORTS

Please keep track of your own expenditures and fund code balances. TS3 can be very helpful in keeping accurate records because it computes the B&T discount for you. You will receive two reports every month: Financial Status report and the Fund Activity report. The first report gives an overview of all fund expenditures; the second notifies you as of titles ordered, received, or cancelled, plus encumbrances for orders, and expenditures for received, as well as how much money you have left.

Please try and spend one half of your funds by December or January. You might want to save a couple of hundred for ‘must-have’ material that are not published until later in the year.

If you run out of funds before the end of the school year, please continue to submit recommendations anyway. We have always managed to scrape extra monies together at the end of the fiscal year. Unordered material at the end of the year will be retained for ordering when funds are opened in September. IF YOU WISH YOUR UNORDERED MATERIAL BACK, PLEASE MAKE SPECIAL ARRANGEMENTS WITH THE ACQUISITIONS STAFF. Otherwise, you can see on your first Fund Activity report what has been ordered for the fiscal year and adjust your meticulous records accordingly.

UPDATING AND WEEDING

Many of you have indicated on your wonderful collection management policies, now online, that you use the following supplemental review materials to update your areas and/or help you to decide what to retain when you are weeding your areas:

1. “Best of’ lists, as they appear in the review journals
2. interlibrary loan requests, sent to you annually
3. missing or ‘self-weeded’ books
4. subject specific bibliographies
5. standard guides to reference, including Balay’s Guide to reference works, Kennedy’s Reference sources for small and medium-sized libraries, and Walford’s Guide to reference material. Current editions of these works are housed in Ready Reference; older editions are kept in Technical Services.
Remember, these are just guidelines—if a work is listed in every review known to man but is never used, there is no reason to allow it to take up valuable space.

Since we have completed intensive weeding, librarians will be asked to weed depending on the type of collection for which they are responsible. You might want to plan your retirement accordingly. Here are the guidelines:

Every year: Popular collection

3 years: Computers; Geography; Medicine

5 years: Agriculture; Business; Careers; Child development; Dictionaries; Economics; Etiquette; Federal documents; Home economics; Photography; Political science; Sociology; Standard tests; Travel guides

10 years: Bibliographies; Botany; Customs; Education; Folklore; Foreign languages; Horticulture; Law; Library & library science; Life sciences; Manufacturing; Mathematics; Philosophy; Psychology; Public Administration; Recreation; Religion; Science; Technology; Travel narratives

15 years: History; Military science; Parapsychology

20 years: Children’s literature & fiction; Decorative arts & fine arts; Fiction; Geology; Literatures; Local history; Music
Gift Guidelines (Draft 4)

10/14/08

Gift items are gratefully accepted only if they match the goals and curriculum of San Antonio College and generally fit a community college level.

Paper periodicals/journals will not be accepted because the Library has transferred most of this type to electronic format.

Legal and medical works, unless they constitute a history, will not be accepted if they are older than three years.

Superseded editions are generally not acceptable, except for some literary areas.

All gifts, once accepted, are the property of San Antonio College Library, and may be cataloged or discarded as needed; they cannot be returned to the donor and must be sent to District for disposal. If the donor does not wish material to be discarded, there are many other libraries in town, especially the public library, which may have more room for duplicates, older editions, etc.
Audio-visual materials must be commercially published; no home-taped versions are acceptable under Copyright provisions.

The Library cannot legally appraise worth of gifts, especially for IRS/tax purposes. All the Library can do, if the donor so desires, is send a letter of thanks to the donor, who must include an address with the gift.

The Library does not pick up gifts. The gifts must come to the Library.

Final decision on the acceptability of a gift rests in the hands of the Subject Specialist for that area.

Memorial gifts must fit the same criteria listed above. However, if the donation is worth over $100.00, it will be placed in the Bookcase area. A note will be added to the catalog entry listing the honoree.

Any work written by an employee of San Antonio College Library will be kept in the McAllister collection at least while the author is alive.
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COLLECTION DEVELOPMENT POLICY

NAME OF LIBRARIAN

DATE

NAME OF DEPARTMENT OR SUBJECT

GENERAL OBJECTIVES

To support the [department/area] curriculum, materials will be acquired to keep the collection current on new theories and techniques in the field of [subject].

SCOPE OF COVERAGE

Language: English will be the primary language of the collection, unless there is a special request from a student or faculty for materials in another language, especially Spanish language material.

Geography: United States publications are emphasized, with some world [subject] materials purchased.

Chronology: Emphasis is placed on the purchase of materials published within the last five years, except in areas covering the history of the subject.

MATERIAL TYPES

All formats may be considered for purchase. Serials are heavily relied upon for current material. Textbooks provide background information. Audiovisual materials will be reviewed for selective additions. CD-ROMs and DVDs are generally added when accompanying print material, but may be purchased separately when available.

SELECTION TOOLS
Materials will be identified through recommendations in or from:

Faculty and student recommendations
Choice
Library journal
Booklist
[Specialized journals]
Publisher’s catalogs and flyers
[Specialized reference works: E&GLI, BGMI, MLA]

RETENTION POLICY:

[In the areas of science, technology, medicine, and business:]

All materials will be considered for de-selection with five years of publication. All superseded editions will be removed from the shelves. Only material containing historic value or consumer interest will be retained beyond the five-year period.

[In the areas of literature and humanities:]

Superseded editions will be removed from the shelves unless they are listed in a major reference tool. Qualifications for indefinite retention include: Historical information on the subject; local connection; community college connection; listed in standard reference works; out of print.
COLLECTION DEVELOPMENT & LIAISON SURVEY FOR 2007/2008:

LIBRARIAN:

DEPARTMENT OR PROGRAM:

DEPT/PROG LIAISON:

LAST DATE LIAISON WAS CONTACTED:

TITLES OF YOUR WEB SITES:
DATE WEB SITE(S) UPDATED:

METHODS OF DEPT/PROG NOTIFICATION:

ACCREDITATION ACTIVITY:
AUTHORITY CONTROL

Definition: the practice of creating & maintaining headings for bibliographic material in the catalog. Its two most important functions are allowing catalogers to distinguish items with similar or identical headings; and it allows catalogers to group materials that belong together by establishing uniform headings. Since all the authority control manuals highly recommend only one authority control manager for a system, the Alamo Colleges indeed have one authority control manager, with one backup librarian in case the manager drops dead.

AUTHORITY RECORDS

Authority records are downloaded monthly from Marcive and are paid for by the entire colleges in the district. These records reflect what cataloging has been input since the last download. However, authority records are also updated through Millennium, which compares existing authority files with new records and then publishes online Headings Reports reflecting problems. Annually, the entire database of records is sent to Marcive for cleanup.

Other lists which are consulted in order to correct old headings and establish new headings are:

Library of Congress’s CATALOGING SERVICE BULLETIN
LIBRARYTYPO web site

RECORD ENTRIES

The standard for authorities within the Alamo Colleges are Library of Congress headings. Each valid authority record usually contains:

A heading established & authorized by LC
Cross references which are variant forms that might be used, either a see reference which lists variant forms that are NOT used, and see also references, which points to other forms which ARE used, usually an earlier or later form

Statement of justification, which lists the sources used to establish the heading, such as a notification from an author as to how they want their name to appear, or a listing of a specific title & publication date from which LC derived the established version.

The following information basically exists so the backup librarian will know what to do to maintain the headings reports.

MILLENNIUM AUTHORITY REPORTS

1. Using the ultra-secret Authorities code, log in to EDIT FUNCTIONS

2. Click on HEADINGS REPORTS

3. You may exclude entries without cataloging dates. You may limit to specific locations, users, programs, or statistics, none of which I choose; it’s all or nothing.

4. There are 11 report files. You do not have to clear a specific report before starting another report as they are all independent. When leaving an individual file, you have to be careful when the system asks if you want to ‘clear all reports’ as this will destroy the entire system of reports, a bad thing. I learned this the hard way, but usually the destroyed reports show up in the next compilation of reports.

5. You can choose the first report ALL but I advise against it. With five libraries, it becomes a massive file and you can easily get confused about what kind of problem you are dealing with. Instead go to the individual reports by unchecking ALL, then checking and clicking on one of the other individual files.

Individual reports always list the number of entries on the bottom right. Enter the heading & the number of entries in a journal. When you are finished with 10 or so records, hit CLEAR, then let the system re-establish the list. When you are through with a report or just want to move on to another report, CLEAR, then subtract the number of remaining entries from the beginning entries. Add up the numbers for all reports you worked on and at month’s end, report the total to the Chair for the Library’s monthly report. The system always asks if you want to clear all reports, and always answer no.
Also, don’t worry if you hit a report and before it lists the entries, you are told the report may not be complete because the system is overloaded. As you clear entries, the system will keep adding new entries that didn’t have available space. Once you clear under 20,000 entries, the system will correct itself and you won’t see the warning.

Each entry in a report lists: number; type of report; field of concern; problem entry; cataloging date; function (utility used); group; initial of cataloger; and entry date. Each entry also lists Preceded by and Followed by. These may be important clues about the problem.

To access an entry within a report, click on the NUMBER of the entry, then EDIT. Once you’ve made any changes, click on SAVE, then CLOSE. You may also look at the item record by clicking on SUMMARY, although this is not always an option for all reports. If you haven’t changed anything, simply click on CLOSE. Always uncheck a report before checking another report to access it.

6. HEADINGS USED FOR THE FIRST TIME

This is usually the largest report. For example, on 9/18/09, it contained 8469 entries. Each entry lists by author or subject heading whatever form never before seen in our catalogs. Sometimes the new form is simply incorrect and hasn’t made it to the INVALID list, but you can see by looking at Preceded by or Followed by that the new form is a variant heading. In order to see which heading is correct, either go to LC’s Authorities site at http://authorities.loc.gov/, use World Cat through our public catalog, or use OCLC Connexion’s Authorities. The latter is recommended as you can choose to Export the correct entry if one is found there.

7. INVALID HEADINGS

Each entry lists the incorrect form and the corrected heading. If you accept the corrected heading, simply hit ENTER and the old heading will be corrected to the new heading. Click on CLOSE and the
system will ask if you want the change, simply answer YES, then CLOSE. If you still need to correct the entry, hit EDIT.

8. DUPLICATE ENTRIES

These entries reflect the duplication of barcodes, especially in online entries. I just click on CLOSE and then CLEAR to clear out all these entries. Be sure and enter the number of entries.

9. BLIND REFERENCES

These entries no longer refer to a heading, especially if it reflects withdrawn material. However, some blind references are blind because LC has changed their form. If the entry is a blind reference, hit EDIT, then under FILE, hit DELETE AUTHORITY RECORD.

10. DUPLICATE AUTHORITY RECORDS

Established authority records are duplicated when the system automatically downloads authorities. Go to an entry, click ENTER, click on the entry, and you will see the duplicates. Always delete the first entry, which is the oldest.

11. UPDATED BIBLIOGRAPHIC RECORDS

Lists changes that have been made. I usually CLEAR the whole thing.

12. NEAR MATCHES

Each entry has a possible corrected entry.
13. RECORDS BUSY, NOT UPDATED

Usually nothing in this list.

14. NON-UNIQUE 4XXS

Click ENTER. If you see THE FIELD IS NO LONGER PART OF THE RECORD, then the problem has already been corrected, so click OK. Otherwise, correct the entries as needed, especially by deleting duplicates.

15. CROSS THESAURUS MATCHES

Usually nothing in this list.

16. if you have no report file checked, you may simply leave this area by clicking on CATALOG or by exiting Millennium.

Extracting bib records for authorities processing:

Before doing anything, make sure there’s money in the budget for this.

IN MILLENIUM...

1. Create a list of bib record to send. Criteria:
   a. Bibliographic search, starting with bib number after last number from last file.
   b. Created before [date] – choose an end date at least a few months prior, so less likely to have brief records or records pending local edits.
   c. Exclude ILL records (all fields do not have ill), reserve items (all fields do not have Ire, pgate, res, srs, dyr, clib), records without items (bib linked rec not exists to item [this didn’t work so well... do a bib linked rec exists to item to make sure it’s equal]
   d. Exclude whatever else catches my fancy
** Create a list from this list of bibs suppression equals ‘n’. The overlay seems to unsuppress them, so you’ll need to resuppress **

2. Export records in MARC format
   a. Go to Data Exchange and Select Process “Output MARC records to…”
   b. Click on “Create” icon
   c. Pick review file, assign file name (use Marcive’s naming convention ACCDmmdd.bib), click on start.
   d. Close, then select output file and click “Put PC”. Put in C:\temp, always a good place.

OUTSIDE OF MILLENNIUM...

1. Using WS-FTP, put file on hermes, for archival purposes
2. Re-open WS-FTP, connecting to Marcive (make sure to connect to correct directory, /input/authority/ (yes, with the typo)), and send file to Marcive.
3. Email Marcive (production@marcive.com) and say something like “I have placed 4500 records on your server as file ACCDmmdd.bib, ready for authorities processing”.
4. Await the return...

Putting back the bibs:

OUTSIDE OF MILLENNIUM...

1. Using WS-FTP, connect to Marcive (make sure to connect to directory specified - /output/ftp/zwmxyvh5 or something similar)
2. Move file and statistical summary report to local (C:\temp).
3. Re-open WS-FTP and copy files to hermes for archival purposes. Make sure to rename them something unique (ex. If file is just ACCDBIBS, give it a number)
4. These don’t need any tweaking – no scripts to run, etc.

IN MILLENNIUM...
1. Click on Data Exchange.
2. Change “select process” to “Load records via locally-created load profiles”
3. Click on “Get PC”, select file, and click “upload”. Make sure file extension is .lfts.
4. Click on Prep, then start, then close after preprocessed.
5. Click on prepped file (with .lmarc extension), and click “Load M” (for Marcive).
6. Remember to delete files and errorlogs when done.
7. St. Philip’s records will show as errors, but they’ll overlay anyway so don’t worry.

OTHER THINGS:

- Email other colleges to let them know file was sent
- Questions for Marcive? Local # 646-6161. Contact is Denise Thompson, dthompsn@marcive.com

Paying for Marcive:

- All colleges contribute equally
- A joint, open P.O. is created

Last number from May 2007 batch: 15375687
Last number from September 2007 batch: 15755307
Last number from December 2007 batch: 1603370x
Last number from May 2008 batch: b16144375