

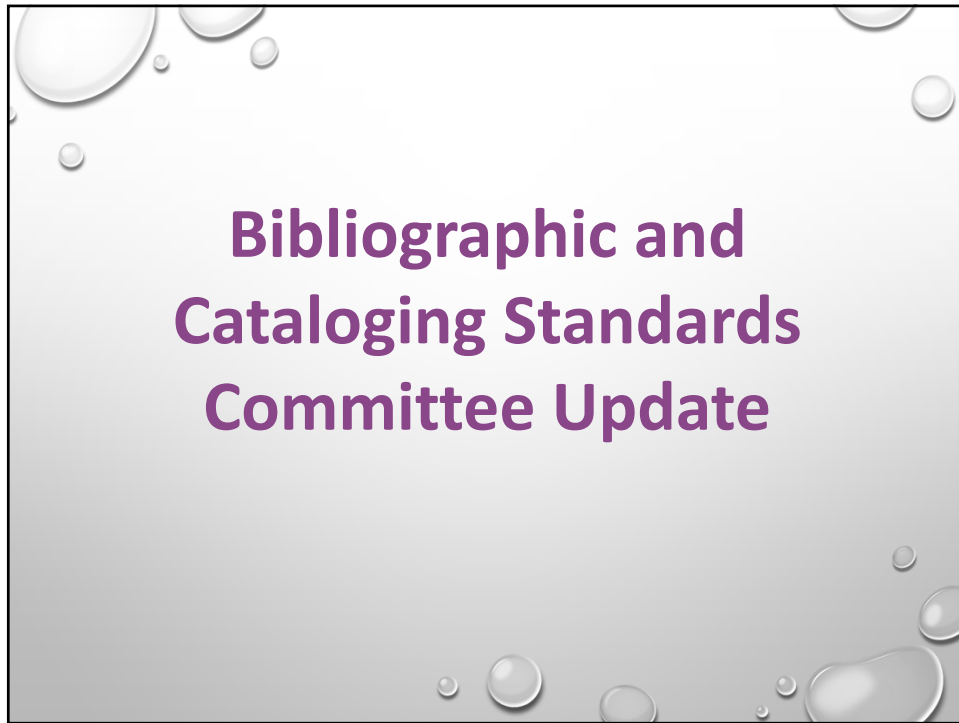
Agenda for Catalogers Training Session Tuesday, January 10th, 2023

1. Welcome – We will do sound checks around 8:50. If you do not hear anything at that time, please adjust your volume. This short video may help if you are having problems with our audio: <https://support.zoom.us/hc/en-us/articles/201362283-Testing-computer-or-device-audio>
2. Please ask questions in the chat area – IHLS staff will monitor chat and ensure the speaker sees questions.
3. SHARE Update
4. Bibliographic and Cataloging Standards Committee Update
5. Miscellaneous Information and Updates
 1. LCGFT & "Large print books"
 2. Annual Reminders
6. CMC Update
7. New Year, New Features: Serials and Cataloging Enhancements to Polaris and Leap
8. Questions

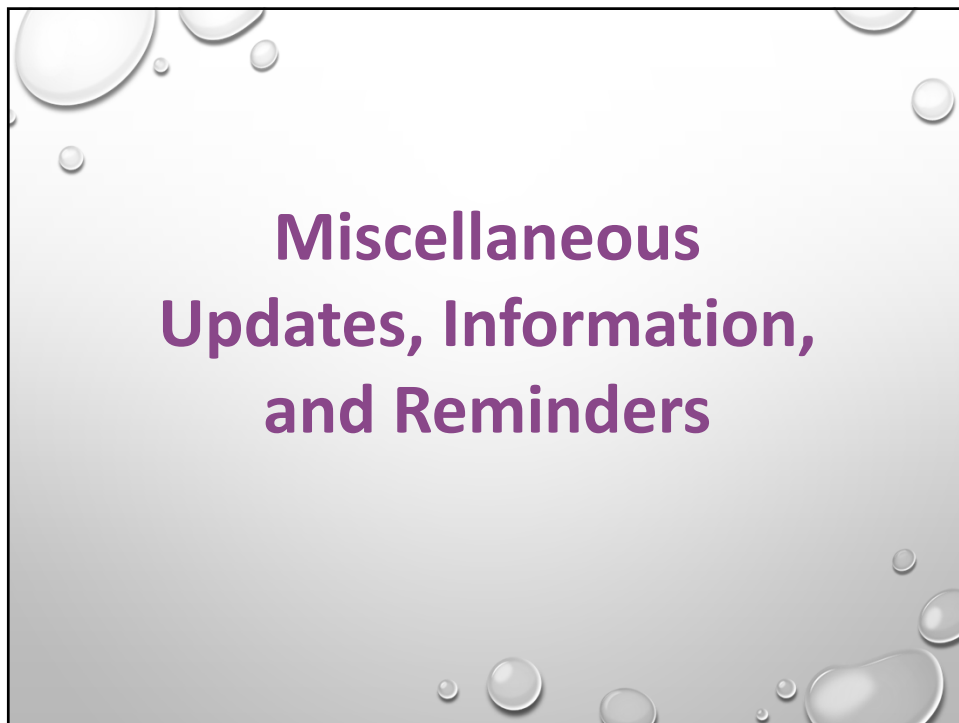
1

SHARE Update

2



3



4

“Large print books”

- December 23, 2022 –“Large print books” was officially added to the LCGFT Genre Term List.
- The SHARE Bibliographic and Cataloging Standards Committee will meet on January 20, 2023 to discuss updates to the “Large print and larger print materials” policy.



LIBRARY OF CONGRESS AUTHORITIES

[Help](#) [New Search](#) [Search History](#) [Headings List](#) [Start Over](#)

SOURCE OF HEADINGS: Library of Congress Catalog
 INFORMATION FOR: Large print books.
 Scope Note:
 Scope Note Books set in a type size larger than normal to enhance readability, improve letter and word recognition, and aid reading comprehension.

5

Friendly Reminders

- Closing out of records in Polaris/Leap
- Encoding levels
- Full level records
- GMDs
- Item dimensions and run time

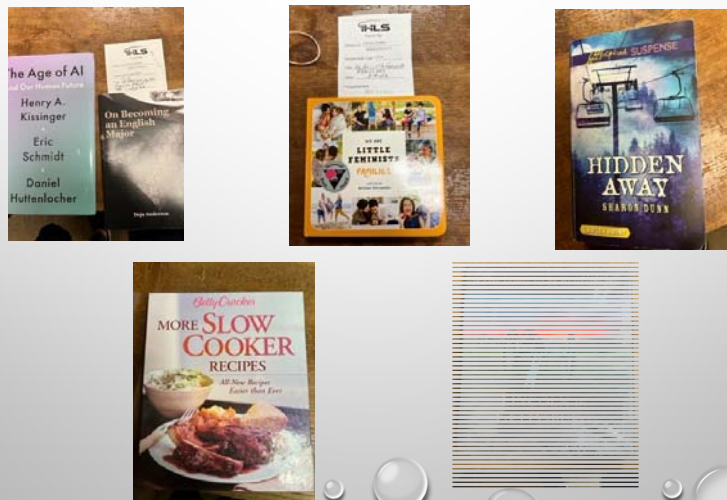
6

Reminders for Items Sent to SHARE Cataloging

- Label your items
- Use removable tape
- Do not cover important information
- When possible, send all original packaging

7

Orphan Items Currently at SHARE Cataloging - Carbondale



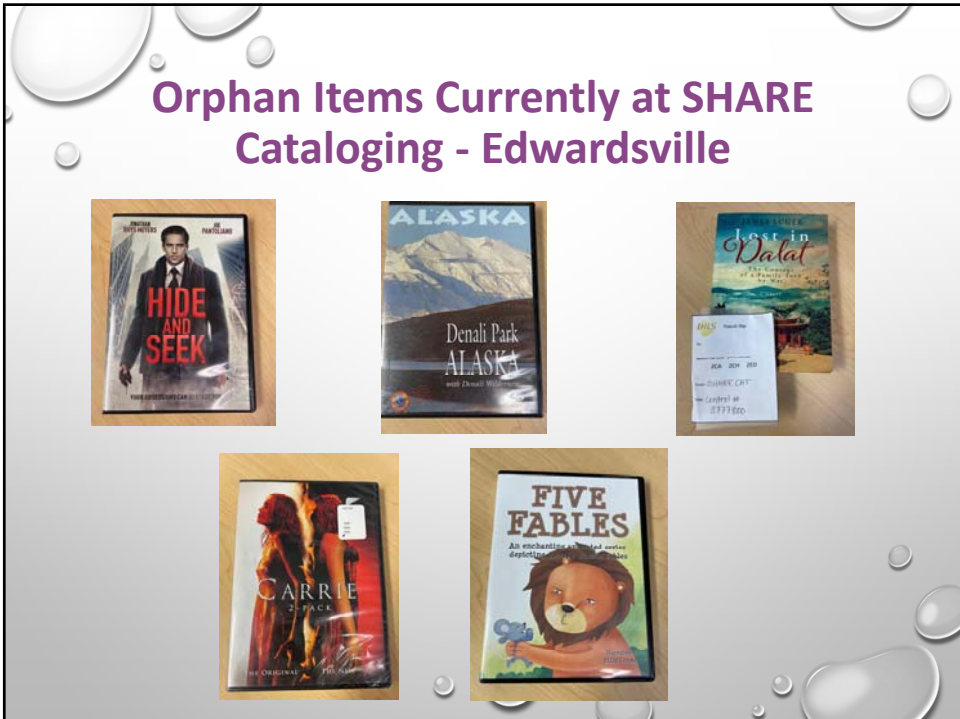
8

Orphan Items Currently at SHARE Cataloging - Champaign



9

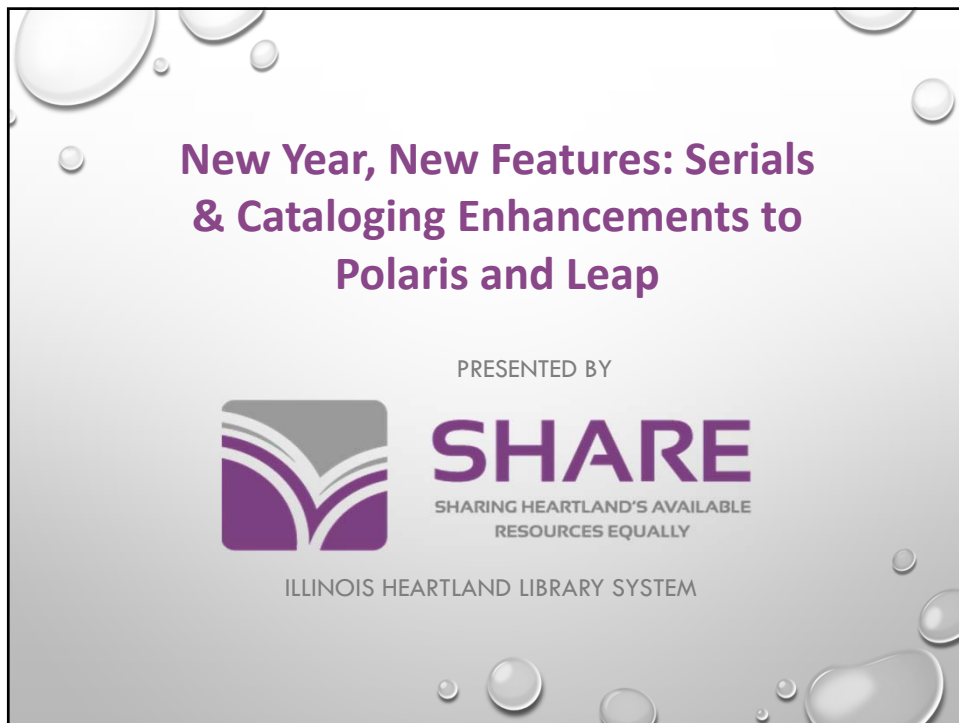
Orphan Items Currently at SHARE Cataloging - Edwardsville



10



11



12

A slide with a light gray background and a decorative border of water droplets. The title is centered in a purple font.

Serials Enhancements in Polaris 7.2 and 7.3

13

A slide with a light gray background and a decorative border of water droplets. The title is centered in a purple font.

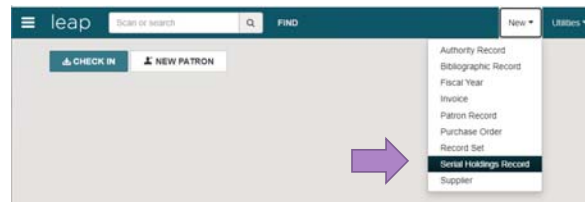
Topics

- Creating Serial Holdings Records in LEAP
- Working with Publication Patterns in LEAP

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Creating a Serial Holdings Record in LEAP

There is now a direct link to create a new Serial Holdings record in LEAP. It's located under the New tab.



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Creating a Serial Holdings Record in LEAP

A blank form opens. This will allow you to create a Serial Holdings record in LEAP.

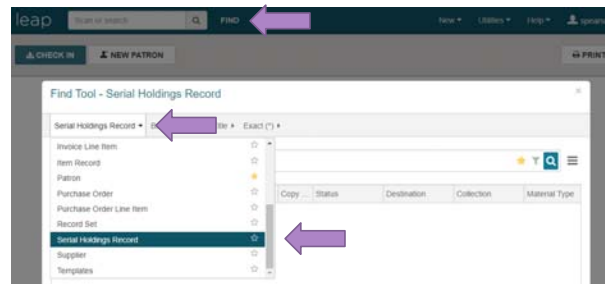
 A screenshot of the 'New Serial Holdings Record - 1' form in the LEAP system. The form is titled 'New Serial Holdings Record - 1' and has 'SAVE' and 'CLOSE' buttons. It contains several sections:

- Metadata:** Status (Serial holdings record ID), Destination (Biosis Heartland Library (Iys.Edwardsville) IZE), Copy no. (1), and Bib control number.
- Order Information:** Order Type (Subscription), Collection (None), and Material type (None).
- Holdings Display:** Call Number Scheme (Dewey Decimal), Prefix, Classification, Cutter, and a checked 'Display in PAC' checkbox.
- Completeness Code:** Completeness Code (None) and Retention Designator (None).
- Publication Patterns:** Buttons for 'CLOSE PATTERN', 'REOPEN PATTERN', and 'DELETE'.
- Table Headers:** A table with columns: CATEGORY, FREQUENCY, START DESIGNATION, REGULARITY PATTERN, CALENDAR CHANGE, and STATUS.

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Searching for a Serial Holdings Record in LEAP

You can now search for a Serial Holdings record from the Find Tool instead of having to access it through the Serials module.

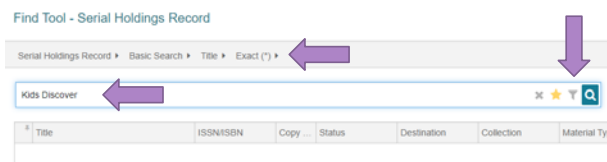


- ✓ Click Find
- ✓ Click to open the search by options
- ✓ Select Serial Holdings Record

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Searching for a Serial Holdings Record in LEAP

Searching for a Serial Holdings record under the Find Tool in LEAP.



- ✓ Searching for a Serial Holdings Record by Title.
- ✓ Enter the title in the search box.
- ✓ Click the filter button to limit the results to a specific branch.

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Searching for a Serial Holdings Record in LEAP

Click Add Condition and select Branch.

Find Tool - Serial Holdings Record

Search Filter

+ ADD CONDITION

Enter your branch and click Apply

Find Tool - Serial Holdings Record

Search Filter

Branch = Illinois Heartland Library Sys-Edwar

APPLY CANCEL

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Searching for a Serial Holdings Record in LEAP

Click the search button.

Find Tool - Serial Holdings Record

Serial Holdings Record • Basic Search • Title • Exact (*)

Kids discover

The result(s) will display – double-click to open the record – or click the Open button.

Find Tool - Serial Holdings Record

Serial Holdings Record • Basic Search • Title • Exact (*)

Kids discover

Title	ISSN/ISBN	Copy	Status	Destination	Collection	Material Type
Kids discover	1054-2868	1		zeds		

Ready

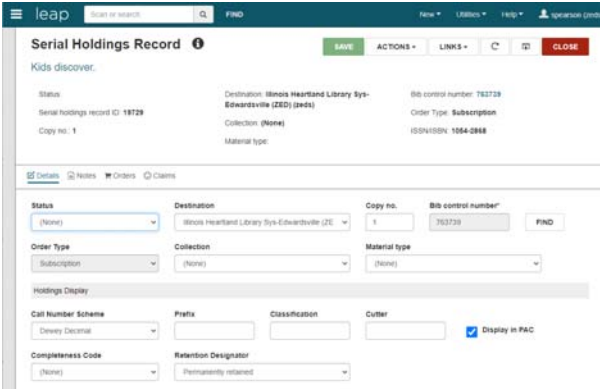
Count Only

OPEN CANCEL

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Editing a Serial Holdings Record in LEAP

From here you can edit the Serial Holdings Record.

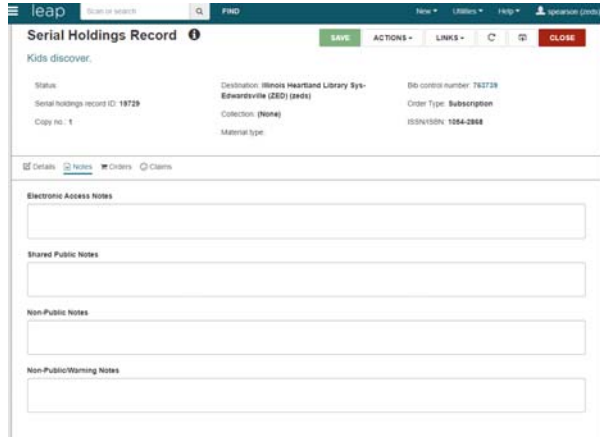


This is a view of the Details tab of the Serial Holdings record.

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Editing a Serial Holdings Record in LEAP

You can also view/edit the Notes portion of the record.



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Editing a Serial Holdings Record in LEAP

You can view/edit the Orders portion of the record.

The screenshot shows the 'Purchase Order' section of a serial holdings record in the LEAP system. The interface includes the following fields and sections:

- Purchase Order:**
 - Owner: Illinois Heartland Library Sys-Edwardsville (ZED) (2005)
 - Supplier: [Field]
 - SAN: [Field]
 - PO Number: [Field]
 - Plan Description: [Field]
 - Subscription Details:
 - Start Number: [Field]
 - Start Date: [Field]
 - Expiration Date: [Field]
 - Intent to Cancel Date: [Field]
 - Membership:
 - Designation:
 - Member Name: [Field]
 - Member Organization: [Field]

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Editing a Serial Holdings Record in LEAP

You can view/edit the Claims portion of the record.

The screenshot shows the 'Claims' section of a serial holdings record in the LEAP system. The interface includes the following elements:

- Serial Holdings Record:**
 - Status: Kids discover.
 - Serial holdings record ID: 18729
 - Copy no.: 1
 - Destination: Illinois Heartland Library Sys-Edwardsville (ZED) (2005)
 - Collection: (None)
 - Material type: [Field]
 - RD control number: T82729
 - Order type: Subscription
 - ISSN/EISSN: 1054-2868
- Subscription ID:** [Field]
- Claims Table:**

CATEGORY	CLAIM NUMBER	CLAIM WAITING PERIOD
<input type="checkbox"/>		

Once you're done viewing/editing the Serial Holdings record you can Save and/or Close.

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Working with Publication Patterns in LEAP

You can now work with Publication Patterns in LEAP. A Publication Pattern is a pattern created to predict future serials issues or parts.

In previous versions of LEAP - you could view the publication patterns table but no actions could be performed.

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Working with Publication Patterns in LEAP

To view the publication pattern – open a Serial Holdings Record and go to Details View.

Kids discover:

Status: Serial Holdings Record ID: 19729 Destination: Winona Healthcare Library Sys-Edwardsville (LE2) (2448) Bib control number: 763728
 Copy no.: 1 Collection: (None) Order Type: Subscription ISSN/EISSN: 1054-2868
 Material type:

Details Issues Orders Claims

Status: (None) Destination: Winona Healthcare Library Sys-Edwardsville (LE2) (2448) Copy no.: 1 Bib control number: 763728 FIND

Order Type: Subscription Collection: (None) Material type: (None)

Holdings Display

Call Number Scheme: (None) Prefix: Classification: Cutter: Display in PAC

Completeness Code: Retention Designator: (None)

Publication Patterns

Close Pattern Reopen Pattern Delete

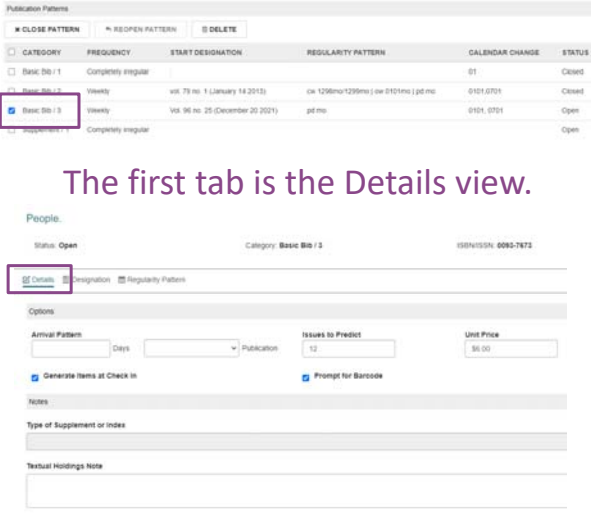
CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN	CALENDAR CHANGE	STATUS
<input type="checkbox"/> Book 396 1 1	Monthly	Vol 23 No 1 (January 2015)	Jan 01 02 03 04 05 06 07 08 09 10 11 12		Open

Publication Patterns are located at the bottom of the Serial Holdings record.

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Working with Publication Patterns in LEAP

To view a Publication Pattern – just click on the pattern you want to view.

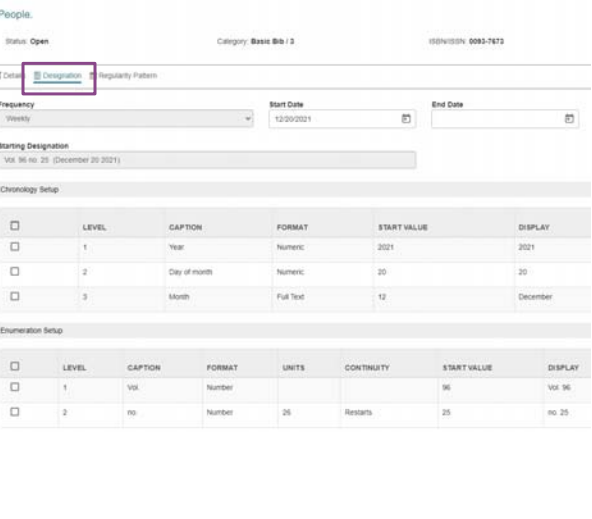


The first tab is the Details view.

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Working with Publication Patterns in LEAP

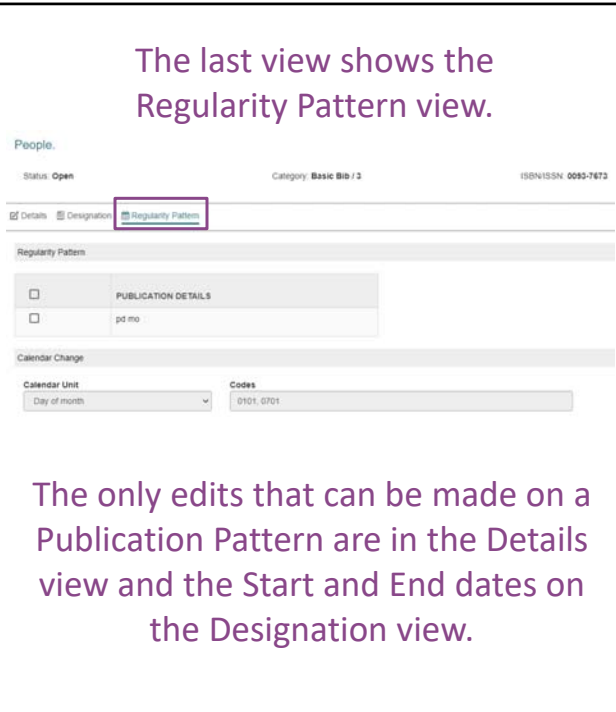
Another tab is the Designation view – This view shows the enumeration and chronology values.



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Working
with
Publication
Patterns in
LEAP

The last view shows the
Regularity Pattern view.

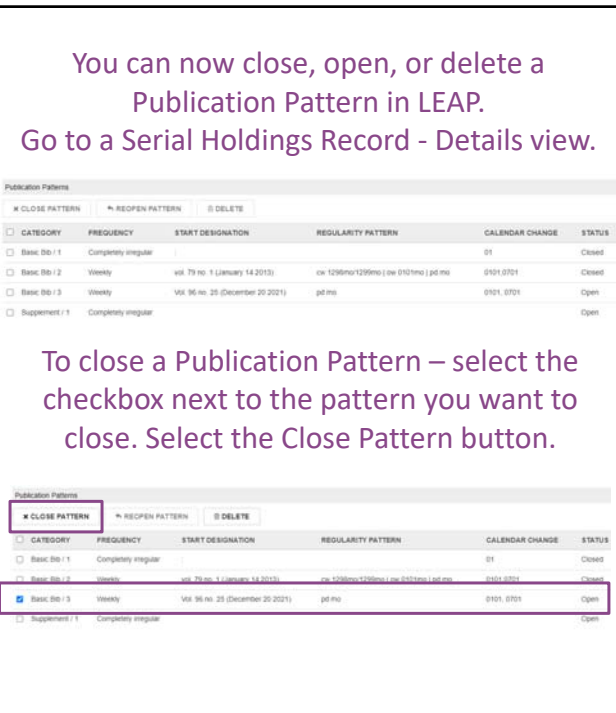


The only edits that can be made on a
Publication Pattern are in the Details
view and the Start and End dates on
the Designation view.

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Closing,
Opening or
Deleting a
Publication
Pattern in
LEAP

You can now close, open, or delete a
Publication Pattern in LEAP.
Go to a Serial Holdings Record - Details view.



To close a Publication Pattern – select the
checkbox next to the pattern you want to
close. Select the Close Pattern button.

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Closing, Opening or Deleting a Publication Pattern in LEAP

To open or delete a Publication Pattern - follow the same instructions as closing a pattern. Click the checkbox next to the pattern and click the Reopen Pattern or Delete button.

Publication Patterns

CLOSE PATTERN
 REOPEN PATTERN
 DELETE

<input type="checkbox"/>	CATEGORY	FREQUENCY	START DESIGNATION	REGULARITY PATTERN
<input type="checkbox"/>	Basic Bib / 1	Completely irregular	:	
<input checked="" type="checkbox"/>	Basic Bib / 2	Weekly	vol. 79 no. 1 (January 14 2013)	cw 1296mo/1296mo ow 0101mo pd mo
<input type="checkbox"/>	Basic Bib / 3	Weekly	Vol. 96 no. 25 (December 20 2021)	pd mo
<input type="checkbox"/>	Supplement / 1	Completely irregular		

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Reminders when working with the Serials Module

- ✓ To avoid confusion, only SHARE staff will create or edit publication pattern templates.
- ✓ If you receive a new serial or notice that the publication pattern of a currently received serial has changed, please contact:
Sue Pearson (spearson@illinoisheartland.org) or
Linda Johnson (ljohnson@illinoisheartland.org)
- ✓ When you send in a request for a new Publication Pattern – please include the following information:
 - Serials Title
 - Month/months, season, and year (ex. Jan/Feb 2022, Spring 2022)
 - Most recent volume and/or issue number (ex. volume 12, no.3; issue 5)
 - Number of times issued per year (ex. published 10 times a year)
 - Publication regularity (ex. monthly, weekly, bimonthly)

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Reminders
when
working
with the
Serials
Module

If possible, pictures of the information from an issue of the serial are extremely helpful.



33

Reminders
when
working
with the
Serials
Module

If possible, pictures of the information from an issue of the serial are extremely helpful.



The small print at the bottom right of the page says, "This issue counts as two issues, and your subscription terms will remain the same."

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Reminders when working with the Serials Module

If possible, pictures of the information from an issue of the serial are extremely helpful.



This picture is the “title page” of the magazine. It is usually found towards the front, but if not found there look in the back.

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Reminders when working with the Serials Module

If possible, pictures of the information from an issue of the serial are extremely helpful.

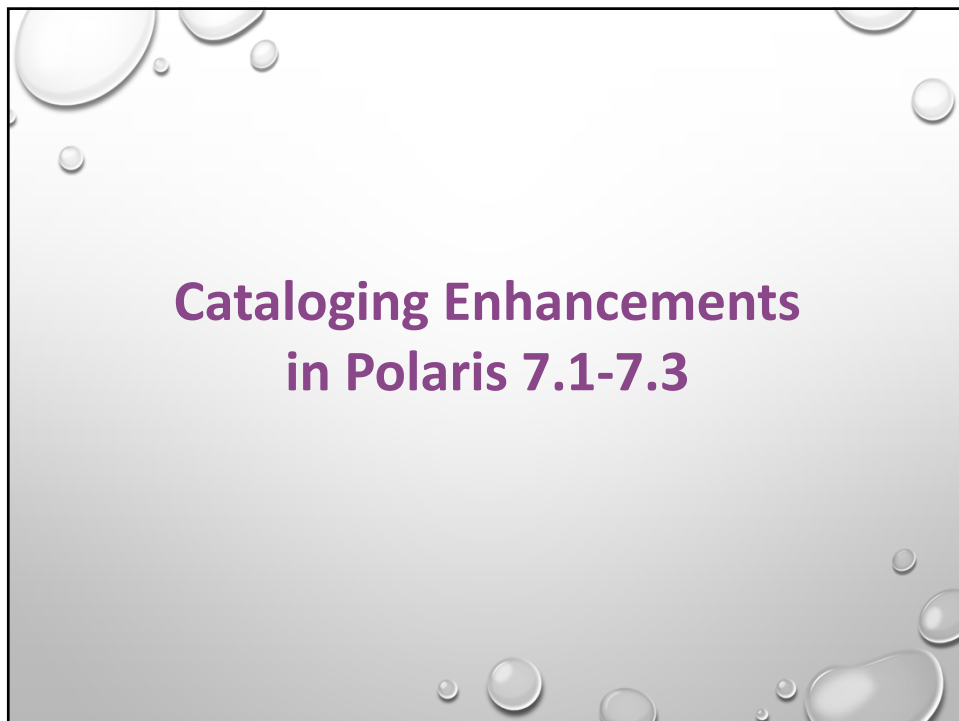


This picture shows the spine of the magazine which can also have important information listed.

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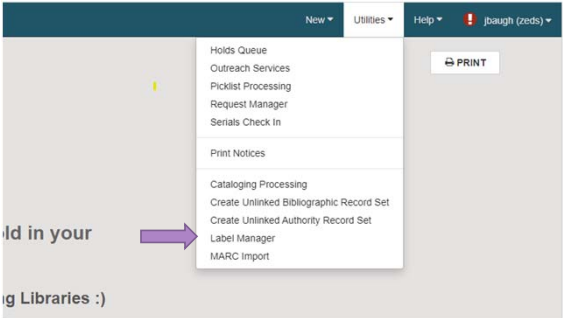
Topics

- Spine Labels in Leap
- Keyboard Shortcuts in Leap
- Replacing Duplicate Records in Leap
- Consolidated View on Leap Item Record Work Form
- MARC Technical Updates

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Spine Labels in Leap

You can now create, view, and edit spine labels in Leap.



The screenshot shows the Leap system interface. At the top, there is a navigation bar with 'New', 'Utilities', and 'Help' menus. The 'Utilities' menu is open, displaying a list of options: 'Holds Queue', 'Outreach Services', 'Picklist Processing', 'Request Manager', 'Serials Check In', 'Print Notices', 'Cataloging Processing', 'Create Unlinked Bibliographic Record Set', 'Create Unlinked Authority Record Set', 'Label Manager', and 'MARC Import'. A purple arrow points to the 'Label Manager' option. To the right of the menu, there is a 'PRINT' button. Below the menu, the text 'id in your' and 'g Libraries :)' is visible.

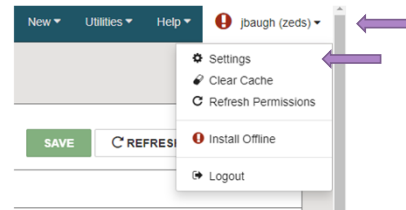
40

Spine Labels in Leap – Configuring Your Labels

Leap supports spine label printing using a PDF printing function and honors the spine label printing settings that you have set up in Polaris.

To configure your default label printing option:

Select your username in the upper right-hand corner.

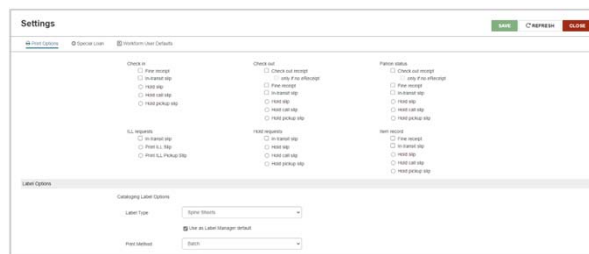


Then select “Settings.”

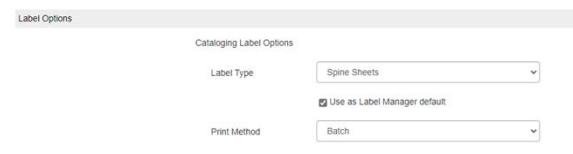
41

Spine Labels in Leap – Configuring Your Labels

Settings menu in Leap:



Section we are interested in:



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Spine Labels in Leap – Configuring Your Labels

Under “Label Type”, select the appropriate label type for your printer.

ILL requests
 In-transit slip
 Print ILL Slip
 Print ILL Pickup S

Hold requests
 test1
 Brandon Test
 Spine Sheets
 SL4 Sheets
 SL6 Sheets
 Serial Sheets
 Spine Continuous feed rolls
 SL4 Continuous feed rolls
 SL6 Continuous feed rolls
 Serials Continuous feed rolls

Cataloging Label Options
 Label Type
 Spine Sheets

Use as Label Manager default

Print Method
 Batch

*If you want the label type you selected to appear as the default when you open that Label Manager in Leap, select “Use as Label Manager default”

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Spine Labels in Leap – Configuring Your Labels

Select one of the following label print methods under Label Options:

Cataloging Label Options
 Label Type
 Spine Sheets

Use as Label Manager default

Print Method
 Batch
 On Demand
 Quick print

On Demand – Label manager will open when you request a label so it can be viewed before printing. **Best option for if you want to edit your label content before printing.**

Batch – Queues your labels as you request them, so multiple labels can be printed later. Limited to 500 labels.

Quick print – Leap prints the label at the designated printer without opening Label Manager in leap. **Works best with continuous feed printers.**

Select Save at the top of the screen.

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Spine Labels in Leap

If you have any problems configuring labels, printing labels, or if the margins are off, please reach out to:

Jennifer Baugh at jbaugh@illinoisheartland.org
or
Dena Porter at dporter@illinoisheartland.org.

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Keyboard Shortcuts in Leap

Keyboard shortcuts available in Leap:

Cataloging Keyboard Shortcuts

The table below lists the keyboard shortcuts you can use when editing bibliographic and authority records.

Action	Keyboard Shortcut
Edit the selected tag	E
Open the INSERT menu	I
Open the Insert Data Field dialog	I then F
Delete the selected tag	D
Move the selected tag up	Shift + Up arrow
Move the selected tag down	Shift + Down arrow
Insert subfield delimiter (\$) in tag Data field	Ctrl + Q

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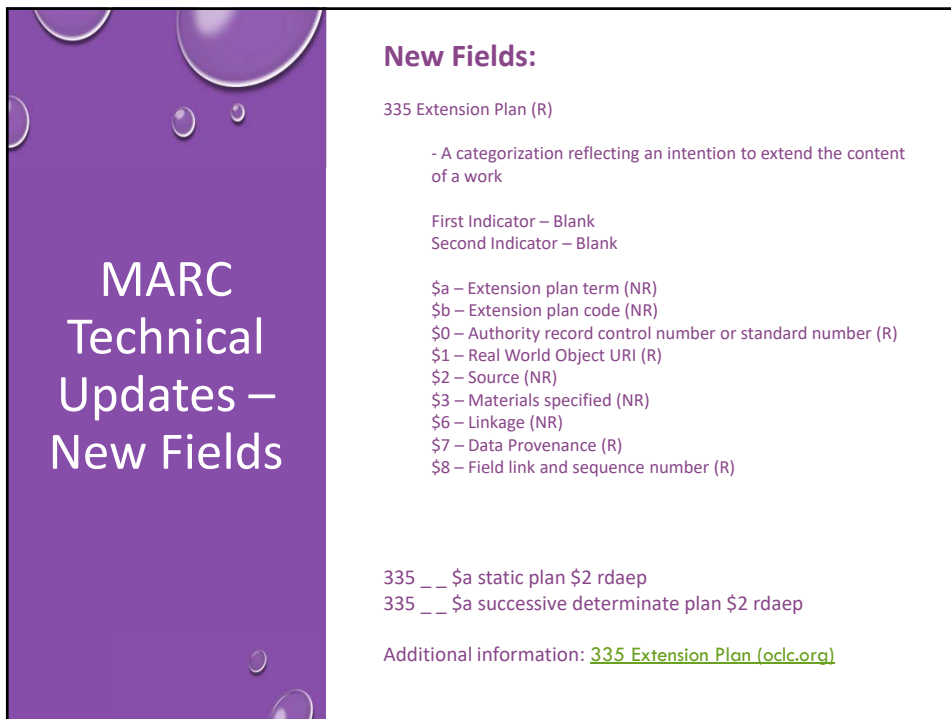


MARC Technical Updates

The following updates specified in the following MARC updates were implemented:

- MARC Update Number 30, May 2020
- MARC Update Number 31, December 2020
- MARC Technical Notice April 13, 2020
- MARC Technical Notice May 1, 2020
- MARC Technical Notice May 19, 2020
- MARC Technical Notice June 26, 2020
- MARC Technical Notice July 28, 2020
- MARC Technical Notice September 11, 2020
- MARC Technical Notice September 16, 2020
- MARC Technical Notice October 23, 2020
- MARC Technical Notice November 13, 2020
- MARC Technical Notice November 24, 2020
- MARC Technical Notice December 14, 2020

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MARC Technical Updates – New Fields

New Fields:

335 Extension Plan (R)

- A categorization reflecting an intention to extend the content of a work

First Indicator – Blank
Second Indicator – Blank

- \$a – Extension plan term (NR)
- \$b – Extension plan code (NR)
- \$0 – Authority record control number or standard number (R)
- \$1 – Real World Object URI (R)
- \$2 – Source (NR)
- \$3 – Materials specified (NR)
- \$6 – Linkage (NR)
- \$7 – Data Provenance (R)
- \$8 – Field link and sequence number (R)

335 __ \$a static plan \$2 rdaep
335 __ \$a successive determinate plan \$2 rdaep

Additional information: [335 Extension Plan \(oclc.org\)](https://oclc.org)

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MARC Technical Updates – New Fields

New Fields:

881 Manifestation Statements (R)

- The field contains manifestation statements, i.e., information that describes the manifestation itself. A manifestation statement is recorded as an unstructured description. Elements for recording a manifestation statement are defined for broad categories of information.

First Indicator – Blank
Second Indicator – Blank

- \$a – Manifestation statement, high-level/general (R)
- \$b – Manifestation identifier statement (R)
- \$c – Manifestation title and responsibility statement (R)
- \$d – Manifestation edition statement (R)
- \$e – Manifestation production statement (R)
- \$f – Manifestation publication statement (R)
- \$g – Manifestation distribution statement (R)
- \$h – Manifestation manufacture statement (R)
- \$i – Manifestation copyright statement (R)
- \$j – Manifestation frequency statement (R)
- \$k – Manifestation designation of sequence statement (R)
- \$l – Manifestation series statement (R)
- \$m – Manifestation dissertation statement (R)
- \$n – Manifestation regional encoding statement (R)
- \$3 – Materials specified (NR)
- \$6 – Linkage (NR)
- \$8 – Field link and sequence number (R)

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MARC Technical Updates – New Fields

New Fields:

881 Manifestation Statements (R) - Continued

881	CROSSING THE CHASM Marketing and Selling Disruptive Products to Mainstream Customers THIRD EDITION Geoffrey A. Moore HARPER BUSINESS An Imprint of HarperCollinsPublishers Copyright © 1991, 1999, 2002, 2014 by Geoffrey A. Moore Printed in the United States of America Originally published in hardcover in 1991 by HarperBusiness, an imprint of HarperCollins Publishers. 2014 ISBN: 978-0-06-229298-8 USA \$19.99 A BUSINESSWEEK BESTSELLER
881	#c THE Opening of Heauen gates, Or The ready way to euer-lasting life. Deliuered in a most Familiar Dia-logue, betweene Reason and Religion, touching Prædestination, Gods word, and Mans Free-will, to the vnderstand- ding of the vweakest Capacitie, and the confirming of the more strong. \#d The second edition. \#c By ARTHVR DENT, Preacher of the word of GOD, at South-shoobery in Essex. \#f Imprinted at London for Iohn Wright, \#g and are to bee sold at his shop at Christ-Church gate. \#f 1611.

Additional information: [881 Manifestation Statements \(oclc.org\)](https://oclc.org)

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MARC Technical Updates – New Subfields

New Subfields:

\$c Aspect ratio value (R) in 345 (Moving Image Characteristics)

-A numerical ratio of the width to the height of a moving image

345 __ \$c 16:9 \$d widescreen

\$d Aspect ratio designator (R) in 345 (Moving Image Characteristics)

-The general description of the ratio of the width to the height of a moving image

345 __ \$d letterboxed \$d mixed aspect ratio

\$p Illustrative content (R) in 340 (Physical medium)

- General and/or specific indication of the type or types of illustrative content present in a resource.

340 __ \$g color \$p illustrations

340 __ \$g one color \$p maps

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Questions?

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