

Cataloging eBooks

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Cataloging eBooks



 This page has been moved over to <https://support.goalexandria.com/knowledge-base/best-practices-for-ebooks/#catalogingebooks>

Catalog an eBook

1. In **Items Management**, click on the plus icon  to add a new title.
2. Choose how you want to add the eBook:
 - a. To find a MARC record match, use **Title Assistant**. Click on the appropriate record to highlight it before clicking **Continue** or pressing <enter>. If the Medium is not "electronic resource" or "downloadable eBook", remember that you can later change the Medium and Policy and add any additional information (e.g. notes) required to perfect your eBook record.
 - b. Or, to add a record manually, **Skip** the Title Assistant.
3. The new title record will appear in the record pane, where you can add or modify any information about the eBook. Here are some fields you should review:
 - a. **Call Number**. Make the Call Number easily identifiable as a title that is (or can be) downloaded to an eReader. For example, if you were cataloging *The Cat in the Hat* by Dr. Seuss, you may want to add the prefix of KIN to the Call Number in order to designate it as an eBook title installed on a Kindle. Then, complete the call number as if you were cataloging a regular book (e.g. KIN CL SEU).
 - b. **Policy**. Select your eBook policy. You'll want to review it in your [Policy Preferences](#) to make sure it's configured correctly. Specifically, check the following:
 - i. On the **Check Out** tab, make sure that the **Transaction Period** drop-down menu is set to **No Loan Period**.
 - ii. On the **Other** tab, make sure the **Allow Hold Requests** option is unchecked.
 - iii. On the **Other** tab, verify that **Show AS ONLINE in Researcher** is checked.
 - c. **Medium**. If necessary, change the Medium (245_h) to something like "electronic resource" or "downloadable eBook".
 - d. **Subjects tab**. Create a convenient link to the eReader group on which the eBook was downloaded/installed by using the title of the eReader group as a subject heading. See [Add eReader Group as Subject Heading](#).
4. When you're done customizing the record, click **Save**.

 You can also [import multiple eBook records at once](#).

Site-specific eBook URLs

For centralized catalogs only.

To make only your eBooks show up in your search:


1. Navigate to the title in Items Management and switch to MARC View.
2. Find the 856 tag for electronic resources. This should already have your link (_u) and link text (_y).
3. Add another subfield to the 856 for _8. In this field, put your site code e.g. EVE. An invalid site code could cause this item to not show up at all so make sure you get this right.
4. if you have multiple URLs for your different sites, make sure there is an entry for each url.
5. if you want this e-resource to show up at multiple sites, simply create an 852 tag for each site (be sure there is a _u and _y in addition to the _8).
6. Note that _9 can also be used for the site code but we recommend _8.
7. Talk to your vendors about including an 856 _8 for your site in their import files. Otherwise, you will need to do this for all new e-resource items.
8. A title with 856 _8 or _9 'copies' will ONLY show for the site you are searching; this applies in patron interfaces as well as in Items Management. These 'copies' will not count toward your license limits.

Optional Strategies

Here are some extras things you can do with your eBooks and electronic resources.


Add eBook Copies

Generally, we don't recommend adding copies for eBooks and electronic resources. This is because it gives patrons the wrong impression on how to access those items, is often considered incorrect cataloging (since there aren't actual copies), and it may contribute to your item limits. However, you might choose to add eBook copies if you want to track usage or have digital copies that can only be loaned to one person at a time.

If you want to add copies to your eBooks, first follow the instructions to [Catalog an eBook](#). After you click **Save**, a dialog will pop up asking if you want to add a copy. Clicking **Add** will create a new, blank copy in the record pane. Fill out the copy's information and click **Save**. You can add more copies by clicking on the **Actions** menu  and selecting **Add Copy** (adds one new copy) or **Duplicate Copy** (adds multiple new copies).

Add eReader Group as Subject Heading

Create a convenient link to the eReader group on which the eBook was downloaded/installed by using the title of the eReader group as a subject heading. This way, patrons will be able to see the eReader group for an eBook by looking at its [expanded details](#) in Search or Explore's results.

1. Go to **Items Management** and select the eBook record.
2. Click on the **Subjects** tab.
3. At the top of the window, click the padlock icon to unlock  the record for editing.
4. Click **Add** and select **650 - Subject Added Entry - Topical Term**.
5. In the 650_a field, type the eReader group name (e.g. "Kindle Group 1"). This should exactly match the title of the record for the eReader(s) on which this particular eBook is installed.
6. At the bottom of the window, click **Save** to keep the tag.
7. **Save the record** at the top) to keep your subject heading changes or **Revert** to abandon them.



Add the same subject heading to multiple records at once by using the [Add a MARC Tag utility](#).

Visit the Library of Congress for more information about [650 - Subject Added Entry - Topical Term](#) tags.

Create an eBook Barcode Reference Sheet


If you have eBook copies, run a [Copy Labels \(3x10\)](#) report to create a printable quick reference for all the eBooks in your collection. These are easy to use, distribute, and share at your organization!

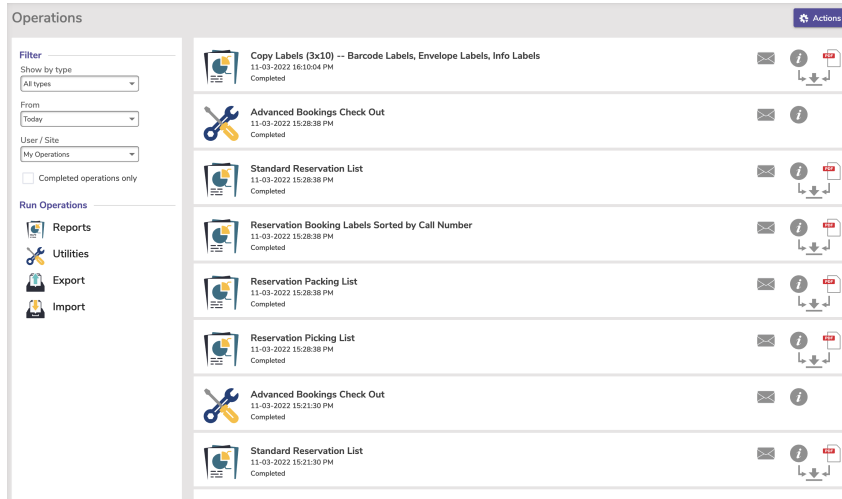
1. Go to **Operations > Reports > Copies > Labels**.
2. Select **Copy Labels (3x10) – Barcode Labels, Envelope Labels, Info Labels**.
3. Configure the **Selections** tab as shown below:

- **Copies with a Status of:** Any
- **Copies with a Policy of:** eBook
- **Copies from:** Copy Location
- **Copies with a Medium of:** Any—though you can choose a more specific option from the dropdown menu.

4. Click on the **Options** tab. Click the **Sort By** dropdown menu and select **Title**.

5. Click the **Run** button at the bottom of the window.

- Next, click the  **Operations** icon in the top right of the Reports window, or go to Operations from your sidenav.
- Locate your report, which should be at the top of the list, and then click the PDF icon to download it to your device.




- Print the PDF and keep a hard copy at your circulation desk so it is readily accessible for reference.



Make this a **Saved** report and mark it as a **Favorite** so you don't have to remember how to set it up again the next time you add more eBook titles.

Catalog an eBook

- In **Items Management**, select the **Titles** tab.
- At the bottom left of the Records List pane, click on the plus icon  to add a new title.
- Choose how you want to add the eBook:
 - To find a MARC record match, use **Title Assistant**. Click on the appropriate record to highlight it before clicking **Continue** or pressing <enter>. If the Medium is not "electronic resource" or "downloadable eBook", remember that you can later change the Medium and Policy and add any additional information (e.g. notes) required to perfect your eBook record.
 - Or, to add a record manually, click **Search** or press <enter>.
- The new title record will appear in the record pane, where you can add or modify any information about the eBook. Here are some fields you should review:
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 - Policy**. Select your eBook policy. You'll want to review it in your [Policy Preferences](#) to make sure it's configured correctly. Specifically, check the following:
 - On the **Check Out** tab, make sure that the **Transaction Period** drop-down menu is set to **No Loan Period**.
 - On the **Other** tab, make sure the **Allow Hold Requests** option is unchecked.
 - On the **Other** tab, verify that **Show AS ONLINE in Researcher** is checked.
 - Medium**. If necessary, change the Medium (245_h) to something like "electronic resource" or "downloadable eBook".
 - Subjects** tab. Create a convenient link to the eReader group on which the eBook was downloaded/installed by using the title of the eReader group as a subject heading. See [Add eReader Group as Subject Heading](#).
- When you're done customizing the record, click **Save**.




You can also [import multiple eBook records at once](#).

Optional Strategies

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If you want to add copies to your eBooks, first follow the instructions to [Catalog an eBook](#). After you click **Save**, a dialog will pop up asking if you want to add a copy. Clicking **Add** will create a new, blank copy in the record pane. Fill out the copy's information and click **Save**. You can add more copies by clicking on the **Actions** menu  and selecting **Add Copy** (adds one new copy) or **Duplicate Copy** (adds multiple new copies).

Add eReader Group as Subject Heading

Create a convenient link to the eReader group on which the eBook was downloaded/installed by using the title of the eReader group as a subject heading. This way, patrons will be able to see the eReader group for an eBook by looking at its [expanded details](#) in Search or Explore's results.

1. Go to **Items Management** and select the eBook record.
2. Click on the **Subjects** tab.
3. At the top of the window, click the padlock icon to unlock  the record for editing.
4. Click **Add** and select **650 - Subject Added Entry - Topical Term**.
5. In the 650_a field, type the eReader group name (e.g. "Kindle Group 1"). This should exactly match the title of the record for the eReader(s) on which this particular eBook is installed.
6. At the bottom of the window, click **OK**.
7. Click **Save** to keep your subject heading changes or **Revert** to abandon them.



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Create an eBook Barcode Reference Sheet

If you have eBook copies, run a [Copy Labels \(3x10\)](#) report to create a printable quick reference for all the eBooks in your collection. These are easy to use, distribute, and share at your organization!

1. Go to **Tools > Reports > Copies > Labels**.
2. Select **Copy Labels (3x10) – Barcode Labels, Envelope Labels, Info Labels**.
3. Configure the **Selections** tab as shown below:

Categories

- All Reports
- Patrons
- Titles
- Copies
- Information
- Labels
- Special Status
- Usage
- Legacy
- Inventory
- Collection Analysis
- Circulation
- Statistics
- Periodicals
- System

Quick Saved

Reports

Copy Labels (3x10) – Barcode Labels, Envelope Labels, Info Labels

Copy Labels (4x20) – Study Programs, Small Labels, Envelope Labels

Copy Labels (5x10) – Spine Labels

Copy Labels (8x6, Tall) – Spine Labels, Study Programs

Copy Labels (8x6, Wide) – Spine Labels

Selections Options

This report is formatted for 3 x 10 label sheets. COMPanion Part Number V0055. Include records for:

Copies with a Status of: Any

Copies with a Policy of: eBook

Copies from: Copy Location From Through

Copies with a Medium of: Any Medium

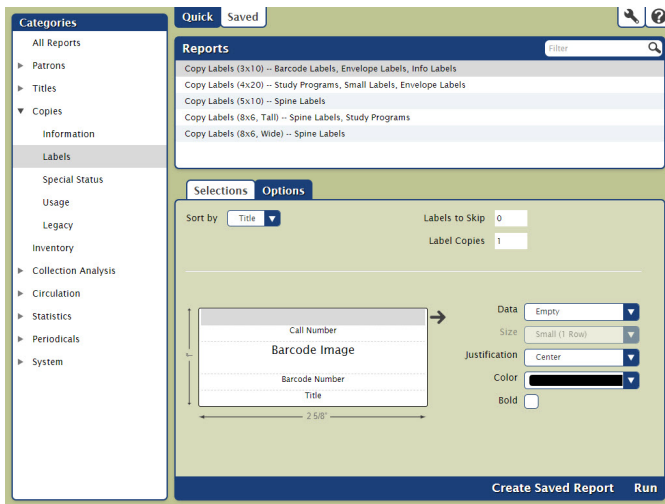
Copies in Call Number Range From Through


Copies added From MM/DD/YYYY Through MM/DD/YYYY

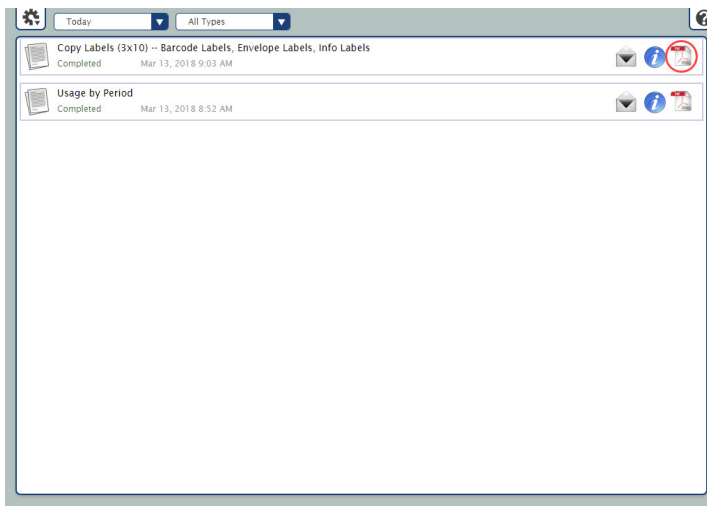
NOTE: For labels to print correctly, set your printer page scaling to none or 100%.

Show Additional Selections Create Saved Report Run

- **Copies with a Status of:** Any
 - **Copies with a Policy of:** eBook
 - **Copies from:** Copy Location
 - **Copies with a Medium of:** Any—though you can choose a more specific option from the dropdown menu.
4. Click on the **Options** tab. Click the **Sort By** dropdown menu and select **Title**.



5. Click the **Run** button at the bottom of the window.
6. Next, click the  **Operations** icon in the top right of your window.
7. Locate your report, which should be at the top of the list, and then click the PDF icon to download it to your device.



8. Print the PDF and keep a hard copy at your circulation desk so it is readily accessible for reference.



Make this a **Saved** report and mark it as a **Favorite** so you don't have to remember how to set it up again the next time you add more eBook titles.