

# Cataloging Best Practices

## Items

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# Cataloging Best Practices



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

## Overview

Getting ready to catalog? Take a look at our recommended steps and helpful tips! Whether this is your first or fiftieth time adding items to Alexandria, we've got you covered.

### Prepare

Make the process easier by making a plan and getting to know your tools.

### Catalog

Learn how to add books, ebooks, and equipment!

### Enhance

Keep your catalog clean and enhance your records.



You may also want to check out our [Items Management Workshop and FAQs](#).

## Prepare

### Prepare

Before cataloging items, there are a few things you should do to prepare.

#### Familiarize yourself with Items Management and Researcher

**Items Management** is where you manage title records and copy records. **Title records** contain general information about the item that is the same for every copy. This includes author, publisher, subjects, Lexile, and more. Each title can have one or more copies. **Copy records** represent each individual (physical) copy of the title in your collection; each copy is assigned an individual barcode number. "Items" may refer to either or both.

Your license determines how many title and copy records you can have; go to the [Help Menu](#) > About Alexandria to see your current record totals.

Once you've added titles and copies to Items Management, patrons will be able to search for them in **Researcher**. Learning how Alexandria's various search interfaces work will help you make your catalog more searchable for patrons.

Here are a few pages you should briefly check out:

- [How Search Works](#)
- [Researcher Best Practices](#)
- [Cataloging Series and Serials](#)
- [Mediums in Alexandria](#)

#### Decide on call number and barcode formats

##### Call Numbers

There are different ways to structure your physical library and, consequently, set up your call numbers. Call numbers are like addresses; they indicate where patrons can find items in your library. [Dewey Decimal](#) and [Library of Congress](#) are common classifications.

Another increasingly popular way to organize your library is by genre. And it's common for genre-fied libraries to use a combination of genre and author last name as call numbers; often these are abbreviated. For example, with a call number of **FIC SHU**, **FIC** would be short for the genre—fiction—and **SHU** would be short for the author's last name—Shusterman.

Call number sections in Alexandria can be separated by spaces and/or periods. Here are some examples of call numbers that work in Alexandria:

- FIC CHR
- 327.67 DEE
- 355 SIE

When printing spine labels, you can choose whether to split sections where there are spaces or spaces & periods.

Alexandria formats call numbers to remove control characters and double spaces, thus correcting incorrectly formatted numbers. If you'd like to keep double spaces in your call numbers, use the "fixed space" character.



Clean up your call numbers and other data with our [Mitinet services](#)!

## Barcodes

Barcodes are the IDs for your copies. You'll want to decide on a standard format for your barcodes. Here are some resources to help you:

- [Barcode Your Collection](#)
- [Barcode Labels](#)



If you need a list of unused barcodes for a vendor or yourself, use the [Unused Barcodes report](#) (*Range Information* or *Barcode List* formats).

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## Set your cataloging preferences

Adjust your [Items Preferences](#)—especially the [Cataloging](#) tab—so that your defaults are set for new items.

## Prepare

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### Call Numbers



Unknown macro: 'multiexcerpt-include-macro'

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## Set your cataloging preferences

Adjust your [Items Preferences](#)—especially the [Cataloging](#) tab—so that your defaults are set for new items.

Item Defaults
Policy Mapping
Cataloging
Cover Art

These preferences configure some of the default settings applied to new items when they are added to your collection.

### Barcode Settings

New items are assigned the next available barcode number provided here unless you assign them a number manually. Set this field when you first configure Alexandria so that new items are assigned barcode numbers that coincide with your numbering strategy.

Next Barcode

### Policy & Medium

Select the default item policy and medium to use for new items. If an operator-created item policy is applied and later removed, this preference will revert back to **Standard Item**

Default Policy  Default Medium

### Copy Location & Status Defaults

Values entered here will be used as defaults when changing copy locations using the **Set All Copy Locations** data manipulation command: "CH".

New Copy Default Status ☒ Available ☐ In Processing Site

Copy Location

Copy Shelving

### Temporary Items

Any item with a barcode in this range will be automatically assigned temporary status. These barcodes must be numeric.

Beginning Temporary Barcode Number

Ending Temporary Barcode Number

Default Temporary Item Policy

### Default Z39.50 Set

Select the default Z39.50 Set to use in Title Assistant when adding new items.

Default Z39.50 Selection

Catalog

Catalog

It's time to add those items! Here are some general instructions and tips.


Catalog books

There are two places you can add items in Alexandria:

Items Management

Add titles and copies individually through Items Management.

- [Title Assistant](#) is a cataloging tool that helps you see whether a title already exists in your collection so you can avoid duplicates. It can also find the title's complete MARC record if it can be located in one of your [Z39.50 servers](#). Then you can add that MARC record to your collection without having to enter all that information manually. You'll be prompted to add copies after saving the title record.

 Searching by ISBN will give you the most accurate matches.



## SmartMARC® Title Assistant



Select a title to add it to your collection, or press SKIP to add a title manually. Titles already in your collection are marked in bold; selecting a bolded title will let you add a copy instead.

Title	Medium	Location
Anne	performed music-audio-audi...	OH - Special - OhioLINK
<b>Anne of Avonlea</b>	<b>Book</b>	<b>OH - Special - OhioLINK</b>
Anne of Avonlea	text-unmediated-volume	OH - Special - OhioLINK
Anne of Avonlea	text-unmediated-volume	OH - Special - OhioLINK
Anne of Avonlea	Book	OH - Special - OhioLINK
Anne of Avonlea	Book	OH - Special - OhioLINK
The fragrance of sweet-grass	text-unmediated-volume	DC - Special - Library of Congress
Anne of Avonlea	Book	OH - Special - OhioLINK
Anne of Avonlea	text-unmediated-sheet	OH - Special - OhioLINK
Anne of Avonlea	Book	DC - Special - Library of Congress
Anne of Avonlea	Book	OH - Special - OhioLINK

Completed. 3 databases examined

LDR00553nam 2200157i 4500^  
0011039607^  
00519820812000000.0^  
0087410141970|||||||eng u^  
020 \_a0448025442^  
040 \_cCIN\_dCIN^  
10010 \_aMontgomery, L. M.\_d1874-1942\_q(Lucy Maud),^  
24510 \_aAnne of Avonlea\_cby L.M. Montgomery\_hBook^  
2600 \_aNew York\_bGrosset & Dunlap\_c[1970, c1936]^  
264 \_aNew York\_bGrosset & Dunlap\_c[1970, c1936]^  
300 \_avii, 366 p.\_c22 cm^  
4900 \_aAnne of Green Gables book^  
520 \_aAnne returns to Avonlea to teach in her former school and discovers the pleasures and puzzles of growing up.^

**CANCEL** **BACK** **SKIP** **CONTINUE**

- If you want to skip Title Assistant to manually add a title—equipment, for example—simply click **Search** or hit **<enter>** on your keyboard. This will bring up a blank title record.
- The [MARC View Editor](#) allows you to view and modify the entire MARC record for a title. You can also use [Item Editors](#), which allow you to customize the MARC record for an item without having to toggle to the MARC View Editor.

See [Cataloging eBooks](#) for instructions on making your eBooks site-specific URLs.

### Import

Using an import is the easier option if you need to add a lot of records at once. With a tab-delimited file or MARC/MicroLIF records from a vendor, you can [import](#) a bunch of items all at once into Alexandria. We recommend adding [titles and copies together](#).



If item records are imported with a non-existent or invalid site code, they will be assigned to the [Union Site](#). Copies assigned to the Union Site have a status of [In Processing](#) and can't be circulated to regular patrons.

You can move those records to their correct site with the [Reassign Union Site Copies utility](#).


### Catalog other resources (ebooks, Chromebooks, etc)

Cataloging non-book items is a very similar process. You can manually add other resources in Items Management and/or import ebooks.

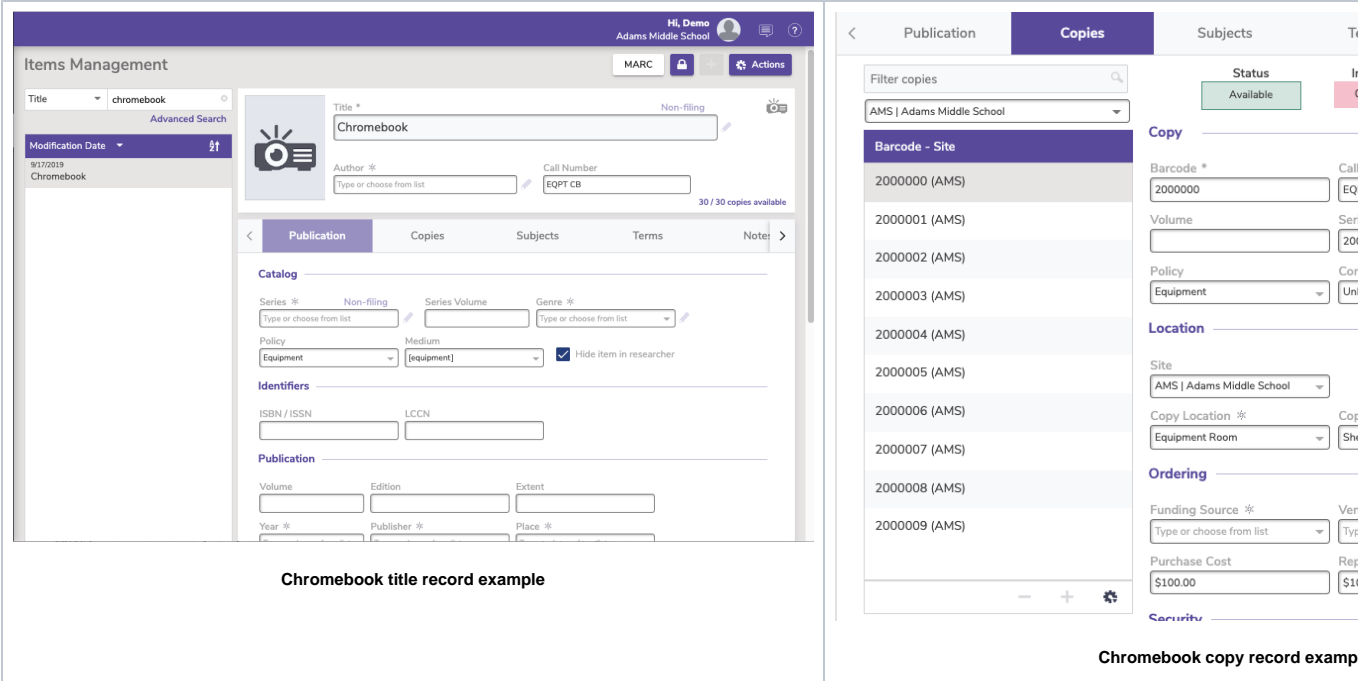
#### Items Management

1. In Items Management, add a new item by clicking the plus icon **+** at the bottom left corner of the window.
2. Click **Search** or hit **<enter>** on your keyboard to skip Title Assistant. This will bring up a blank title record.
3. Next, fill out the record. Use the Title, Author, and Publisher fields for what would be the best equivalent. For example, in the Title field, you might type "Chromebook" or whatever term that represents your specific equipment. Similarly, you can use other fields to add other important information; this information will help you reference the item throughout Alexandria, select it in Reports, or find it in Researcher.

4. The **Copy** tab is where you add information unique to individual items, such as the serial number. Keep in mind that you'll want to barcode non-book items the same as you would a book, so be sure to *not* use the item's serial number as its barcode.

 We don't recommend adding copies for ebooks.

5. We suggest initially only adding one title and one copy. With this first item, you can conduct tests in Alexandria to see how the item appears where you plan to look for and use it. For example, you may want to run some reports to make sure you can select the item and that the information is where you'd like it to be. When adding a lot of data, it's always helpful to start small and test things out.



The screenshot displays the 'Items Management' interface for 'Chromosomebook'. The left sidebar shows the 'Title' tab with a search bar and a list of items. The main area shows the 'Publication' tab with fields for 'Title', 'Author', 'Call Number', 'Series', 'Volume', 'Genre', 'Policy', 'Medium', 'Identifiers', and 'Publication'. The 'Copies' tab is active, showing a list of copies with columns for 'Barcode - Site', 'Barcode', 'Volume', 'Policy', 'Location', 'Ordering', and 'Funding Source'. The 'Copy' tab is also visible, showing fields for 'Barcode', 'Volume', 'Policy', 'Location', 'Ordering', and 'Funding Source'.

**Chromosomebook title record example**

**Chromosomebook copy record example**

When adding non-book items, you'll also want to create new [policies](#) and [mediums](#) to accommodate these new and different items. **With new policies**, you will be able to better manage longer or unusual check out times, increase replacement costs, track usage, and more. And **with new mediums**, you will be able to more easily get information through reports, find the items in Items Management and Researcher, and manipulate the data for these items with utilities.

 See our [Cataloging eBooks](#) and [eReaders](#) pages for information specific to those items.

## Import

If you have a tab-delimited file or MARC/MicroLIF records from a vendor, you can also [import ebooks](#).

## Modify records

You may need to make some adjustments to your records after adding them.

- **Mediums in Alexandria.** Learn the differences between General Material Designation (GMD) and Resource Description & Access (RDA) and switch from one to the other if necessary.
- **Cataloging Series and Serials.** Fix your series and volumes so patrons can find items easily.
- **Subjects.** We recommend looking for your newly added items in Search and making sure they're showing up how/when you expect them to. If not, you may need to add more subjects.
- **Call Numbers.** If you imported records, you may need to make adjustments to your call numbers, such as making all of the letters uppercase. This can easily be done with the [Change Title Call Numbers utility](#).
- **Don't Show in Researcher.** If you don't want certain items—such as equipment or teacher-only materials—to show in Researcher, you'll want to make sure Don't Show in Researcher is turned on for those title records. You can turn this on for individual titles in [Items Management](#) or use the [Hide Titles in Search utility](#) to turn it on for multiple titles at once. Those who need to can still [view hidden items in Researcher](#) by searching while holding down **Option / Alt** on their keyboard.

## Print labels

You can print labels for both cataloged and uncataloged items.

- **Copies Labels Reports.** Print barcode and spine labels for items already cataloged in Alexandria.
- **Unused Barcodes report.** If you receive new items that don't have assigned barcodes yet, run this report with the *Barcode Labels (3x10)* format to generate and print some unused barcodes. Then, simply scan the unused barcodes as you enter new copy records.

## Catalog

It's time to add those items! Here are some general instructions and tips.

### Catalog books

There are two places you can add items in Alexandria:

#### Items Management

Add titles and copies individually through Items Management.

- **Title Assistant** is a cataloging tool that helps you see whether a title already exists in your collection so you can avoid duplicates. It can also find the title's complete MARC record if it can be located in one of your [Z39.50 servers](#). Then you can add that MARC record to your collection without having to enter all that information manually. You'll be prompted to add copies after saving the title record.



Searching by ISBN will give you the most accurate matches.

Title	Medium	Location
Harry Potter and the Chamber of Secrets	text-unmediated-volun	Local
Harry Potter and the deathly hallows	[book]	Local
Harry Potter and the Goblet of Fire	text-unmediated-volun	Local
Harry Potter and the Half-Blood Prince	[book]	Local
Harry Potter and the prisoner of Azkaban	text-unmediated-volun	Local
Harry Potter and the sorcerer's stone	[book]	Local
Harry Potter and the Chamber of Secrets	[book]	Local

Searching... 3 seconds, 2 of 4 databases examined

```
LDR12076nam 2201393 i 4500^
001MLM00603706^
003MnBnMLM^
00520131114095051.9^
008000915s2000 nyua c 000 1 eng d^
020 _a0439064872^
040 _aMnBnMLM_beng_cMnBnMLM_dMnBnMLM_erda^
043 _ae-uk-en^
05004_aPZ7.R7968_bHar 2000^
08204_223_a[Fic]^
1001 _aRowling, J. K.^
24510_aHarry Potter and the Chamber of Secrets_cby J.K. Rowling ; illustrations by Mary Grandpre_h[book]^
24630_aChamber of Secrets^
```

**Back** **Enter Manually** **Cancel** **Continue**

- If you want to skip Title Assistant to manually add a title—equipment, for example—simply click **Search** or hit **<enter>** on your keyboard. This will bring up a blank title record.
- The **MARC View Editor** allows you to view and modify the entire MARC record for a title. You can also use **Item Editors**, which allow you to customize the MARC record for an item without having to toggle to the MARC View Editor.

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You can move those records to their correct site with the [Reassign Union Site Copies utility](#).

## Catalog other resources (ebooks, Chromebooks, etc)

Cataloging non-book items is a very similar process. You can manually add other resources in Items Management and/or import ebooks.

### Items Management

1. In Items Management, add a new item by clicking the plus icon  at the bottom left corner of the window.
2. Click **Search** or hit **<enter>** on your keyboard to skip Title Assistant. This will bring up a blank title record.
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4. The **Copy** tab is where you add information unique to individual items, such as the serial number. Keep in mind that you'll want to barcode non-book items the same as you would a book, so be sure to *not* use the item's serial number as its barcode.



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5. We suggest initially only adding one title and one copy. With this first item, you can conduct tests in Alexandria to see how the item appears where you plan to look for and use it. For example, you may want to run some reports to make sure you can select the item and that the information is where you'd like it to be. When adding a lot of data, it's always helpful to start small and test things out.

Title

6

Chromebook

Acer Chromebook

HP Chromebook

iPad

Projector

Speakers

+

🔍

Titles

Copies

🔒

⚙️

MARC

🔍

?

Publication

Subjects

Terms

Notes

Other

Programs

Non-Filing

None

Chromebook

Author

Non-Filing

None

Vol

Volume

Edition

LCCN

ISBN/ISSN

Place

Publisher

Year

Extent

30 of 30 copies available

Call Number

EQPT CB

Policy

Equipment

Medium

[equipment]

Genre

Don't Show in Researcher

5615

Chromebook title record example

Filter

10

2000000

2000001

2000002

2000003

2000004

2000005

2000006

2000007

2000008

2000009

+

🔍

AMS - Ada...

Titles

Copies

🔒

⚙️

Chron

Information

Barcode

2000000

Copy ID

11

Volume

Call #

EQPT CB

Serial #

2000000

Policy

Equipment

Condition

Unknown

Vendor

Copy Notes

Alert Notes

Accession Date:

09/17/2019

Status:

Available

6933

Chromebook copy record example

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## Enhance

### Enhance

Keep your catalog clean and updated.

---

#### Keep your data clean and consistent

- Use [Authority Control](#) to maintain consistency in your catalog.
- Routinely weed out items in your library to make room for new items.
- Standardize your [series](#) information to make items searchable.



See our [Clean Up Your Data](#) article for more recommendations.

---

#### Update and enhance information

- In addition to finding new titles, [Title Assistant](#) can also enhance titles already in your collection.
- Use [Sneak Peek](#) to get updated cover art, reviews, and summaries.
- Look into getting the [BestMARC](#) add-on to enhance your records. This can make your catalog more helpful and discoverable by adding reading program information, converting to [RDA format](#), fixing tags, genrefying, and more!

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SelectionsOptions

Augment your data using BestMARC's data enhancement services. Generally this process is quick but it may take up to 24 hours for the import to complete and to receive all of your files. Mitinet typically recommends running this operation once per month.

Your entire system is authorized to run this operation up to 5 times per month.

Titles with a Policy of

Any Policy

Titles from

Copy Location

From

Through

Titles with a Medium of

Any Medium

Titles in Call Number Range

From

Through

Titles added

From MM/DD/YYYY

Through MM/DD/YYYY

Title

Titles by Author

Titles by Publisher

Titles with Copies in Barcode Range

From

Through

Titles with Copy Barcodes

✓ Show Additional Selections

Create Saved Utility

Run