

Library Connection, Inc.

**Cataloging
Training Manual**

Created March 2014

Updated November 2020

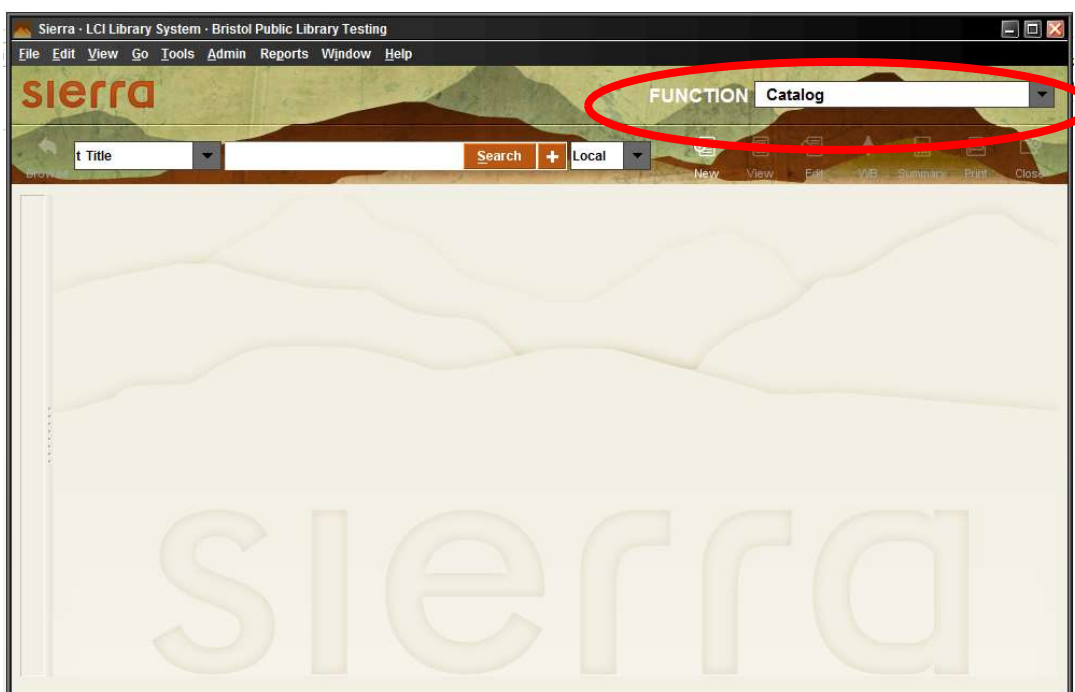
sierra

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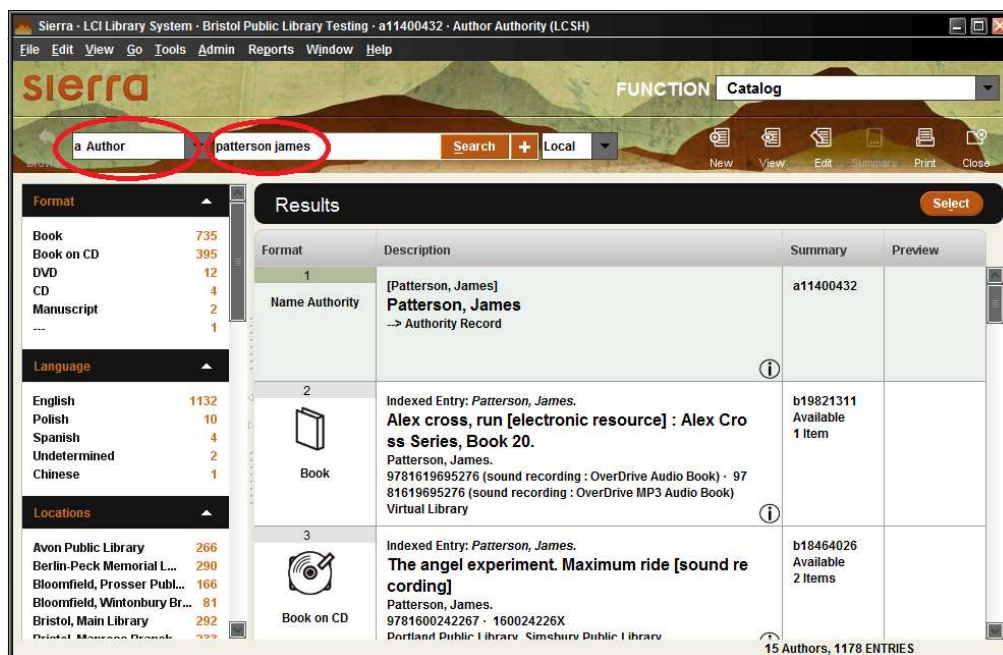
Navigating the Client

To move between different functions within Sierra, use the **FUNCTION** drop-down menu on the top right.



Searching

In the Catalog function, select your index from the drop-down menu on the left and then type your search in the search box and click on **Search**. Other than keyword, all indexes are phrase searches, so, for example, author searches should be last name first. Commas between last and first names are not necessary.



To search by ISBN, ISSN, or UPC number, select the Standard No. index.

Changing the Search Results to a Browse Display

To switch the search results to a browse list, rather than one bib record per line, go to **Admin > Settings > Display**, and click on **Compact Browse** under Browse Options. Save your Settings change. You must log out and restart a new session for the Compact Browse option to take effect.

The screenshot shows the Sierra LCI Library System interface for Bristol Public Library Testing. The search results are displayed in a compact browse format. The search criteria are 'a Author' and 'patterson james'. The results are organized into a table with columns for '#', 'Description', and '# of Entries'.

#	Description	# of Entries
1	+ Patterson, James.	26
2	+ Patterson, James, 1932-1972.	1
3	+ Patterson, James, 1947-	1127
4	+ Patterson, James A., 1947-	1
5	+ Patterson, James C., 1942-	1
6	+ Patterson, James G.	3
7	+ Patterson, James/ Grabenstein, Chris/ Park, Laura (ILT)	1
8	+ Patterson, James H. (James Herbert), 1943-	1
9	+ Patterson, James Herbert, 1943-	1
10	+ Patterson, James/ Ledwidge, Michael/ Cannavale, Bobby (NRT)/ Snyder, Jay (NRT)	1
11	+ Patterson, James/ Ledwidge, Michael/ Mastrogiorgio, Danny (NRT)/ Leyva, Henry (NRT)	1
12	+ Patterson, James/ Lee, Narae (CON)	1
13	+ Patterson, James/ Paetro, Maxine/ Lavoy, January (NRT)	1
14	+ Patterson, James/ Roughan, Howard/ Snyder, Jay (NRT)/ Archer, Ellen (NRT)	1

At the bottom of the results table, it says '15 Authors, 1178 ENTRIES'. On the left side, there are filters for Format, Language, and Locations. The Format filter shows counts for Book (735), Book on CD (395), DVD (12), CD (4), and Manuscript (2). The Language filter shows counts for English (1132), Polish (10), Spanish (4), Undetermined (2), and Chinese (1). The Locations filter shows counts for Avon Public Library (266).

Location Codes

All items have a five-character location code that describes the library building and the shelving location. The codes are broken down as follows:

First two characters – Library building

Third character – Reading level (adult, children, etc.)

Fourth and fifth characters – Shelving location

For example: plafi is the code for Plainville (pl) Adult (a) Fiction (fi).

Modifying Bibliographic and Item Information

After searching and identifying the desired bibliographic record, either double-click the bib record or click on it once and then click on **Summary** or **Select**.

The screenshot shows the Sierra LCI Library System interface. The search results for 'Batman: the dark knight returns' are displayed. The 'Select' button in the top right corner is circled in red. The results table shows three entries:

Format	Description	Summary	Preview
1 Book	Indexed Entry: 1-56389-342-8 Batman : the dark knight returns Miller, Frank. 1-56389-342-8 Granby, Main Library	b19898411 Available 1 Item	
2 Book	Indexed Entry: 1563893428 (paperback) Batman : the Dark Knight returns Batman (Comic strip) Miller, Frank, 1957- 156389341X (hardcover) · 9781563893414 (hardcover) · 1563893428 (paperback) · ... Bristol, Main Library, Canton Public Library, Manchester, Main Library, Windsor, Main Library	b15130708 Available 5 Items	
3 Book	Indexed Entry: 1563893428 (pbk.) Batman : the Dark Knight returns Miller, Frank, 1957- 156389341X · 9781563893414 · 1563893428 (pbk.) · ... Avon Public Library, Burlington Public Library, Colchester, Cragin Memorial Library, East Windsor, Main Library, Glastonbury, Welles-Turner...	b1369246x Available 16 Items	

3 Standard numbers, 4 ENTRIES

View/Edit Bibliographic Record

Once you are on the summary for that record, click on either **View** or **Edit**, depending on which you want to do. Note that you cannot view the more detailed explanation of the Leader characters in View.

The screenshot shows the Summary page for the bibliographic record. The 'View' and 'Edit' buttons in the top right corner are circled in red. The record details are as follows:

b15130708
Author Miller, Frank, 1957-
Title Batman : the Dark Knight returns / Frank Miller, with Klaus Janson and Lynn Varley ; lettered by John Costanza.

Summary

Record i27247491

Item-Level Holds 0
Bib-Level Holds 0

Summary Table:

#	Record Number	Location	Call No.	Volume	Barcode
1	i27247491	9mytn	YA-GRAPHIC NOVEL-MIL		32503093785868
2	i27247508	caaad	GRAPHIC NOVEL BATM...		32531103179012
3	i2724751x	caaad	GRAPHIC NOVEL BATM...		32531114540327
4	i27247521	6mytn	TEEN 741.5973 BATMAN		32505110407103
5	i27247533	2maad	GRAPHIC F MILLER		32519127488006

5 Attached Item Records

Sierra Fixed Fields

The top of the bibliographic record is a set of editable fixed fields that are *not* part of the MARC record and are specific to Sierra functionality.

The screenshot shows the Sierra Fixed Fields form in Edit Mode (OVR). The form is titled 'b15130708' and has a menu bar with 'File', 'Edit', 'View', 'Go', 'Tools', 'Reports', 'Window', and 'Help'. Below the menu bar is a toolbar with icons for 'Browse', 'Insert', 'Save', 'View', 'WB', 'Summary', 'Verify', 'Export', 'Print', and 'Close'. The main form area contains the following fields:

Language	eng English	Cat. Date	01-10-2014	Bib Code 3	- ---
Skip	0	Bib Level	m Monograph	Country	nyu New York (State)
Location	multi	Material Type	a Book		

Below the highlighted section, there is a MARC Leader field with the value '##### c a m 2 2 ##### l a 4 5 0 0'. Below that is a Locations field with the value '2m ,ca ,6m ,9m'. The bottom section of the form contains various utility and standard number fields, including Bib Utility No., Misc., LCCN, and Standard No. fields.

Language: Usually English, but double click for more options.

Skip: Based on second indicator in the 245 field, this is the number of characters to skip for indexing purposes. Does not normally need to be modified.

Location: Represents the library buildings that own this item. If only one library owns it, this field will have the code for just that building. If more than one building owns it, this will say “multi” and the lower Locations field will list the individual libraries.

Cat. Date: Represents when this is a fully cataloged official record. Can be used to remove temporary/ephemeral records from reports such as exporting records for FindIT.

Bib Level: Derived from the Leader, generally preset.

Material Type: Used to display format of item in OPAC. Originally based on the Leader record type, but can deviate to give better descriptions (such as breaking out Blu-ray from DVDs). Changing this does *not* change the Leader, so the original MARC record will be retained. Double click on the code to see other options.

Bib Code 3: Used for suppressing bibliographic records in the OPAC, plus tracking vendor records that need updating (NONOCLC) and records that need cataloging by LCI staff (LCICAT).

Country: The country or state the item is from.

Viewing/Editing MARC fixed field details

To see more details about the Leader (000), the 007, or the 008, right click on the field (in Edit mode) and select Expand Field, or just click on the field and type ctrl-r.

All of the MARC fields act as they normally would in any other system. The description to the left of the MARC field number is the index in which that field should be found. Fields designated as "Misc." are not indexed.

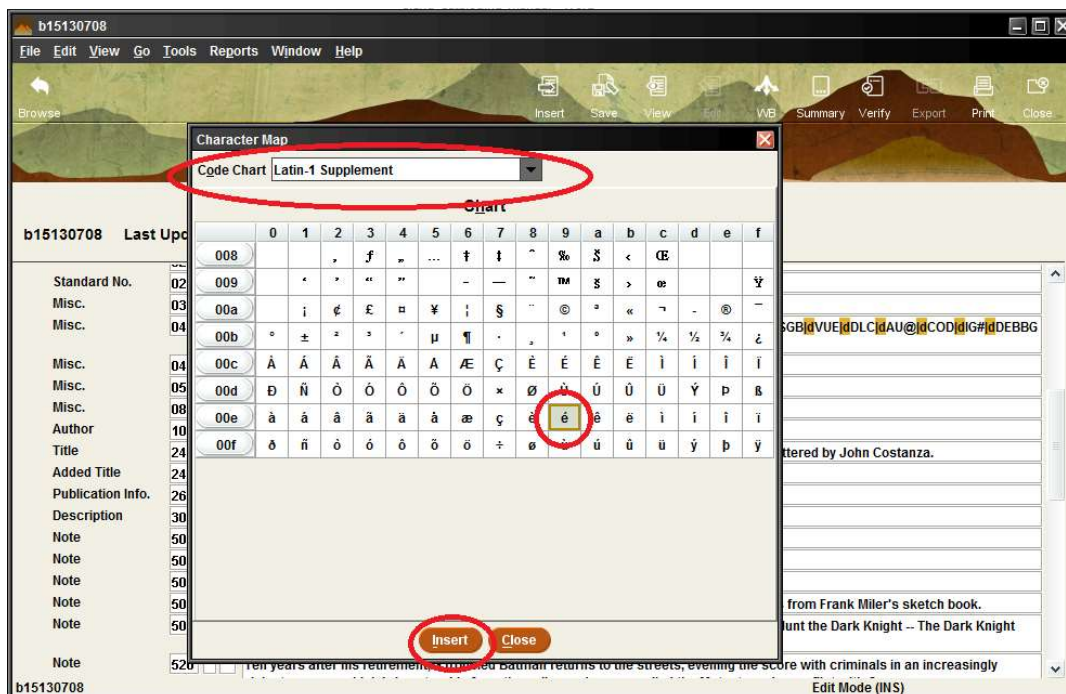
Entering Subfields

To enter a subfield, use the | character (shift-\) and type the subfield letter. If the subfield shows in red, this means it is not listed as a valid subfield. Right click on the field and select MARC Tag Info to see what the valid subfields are for that field. Contact LCI if you believe a subfield that should be valid is missing.

7

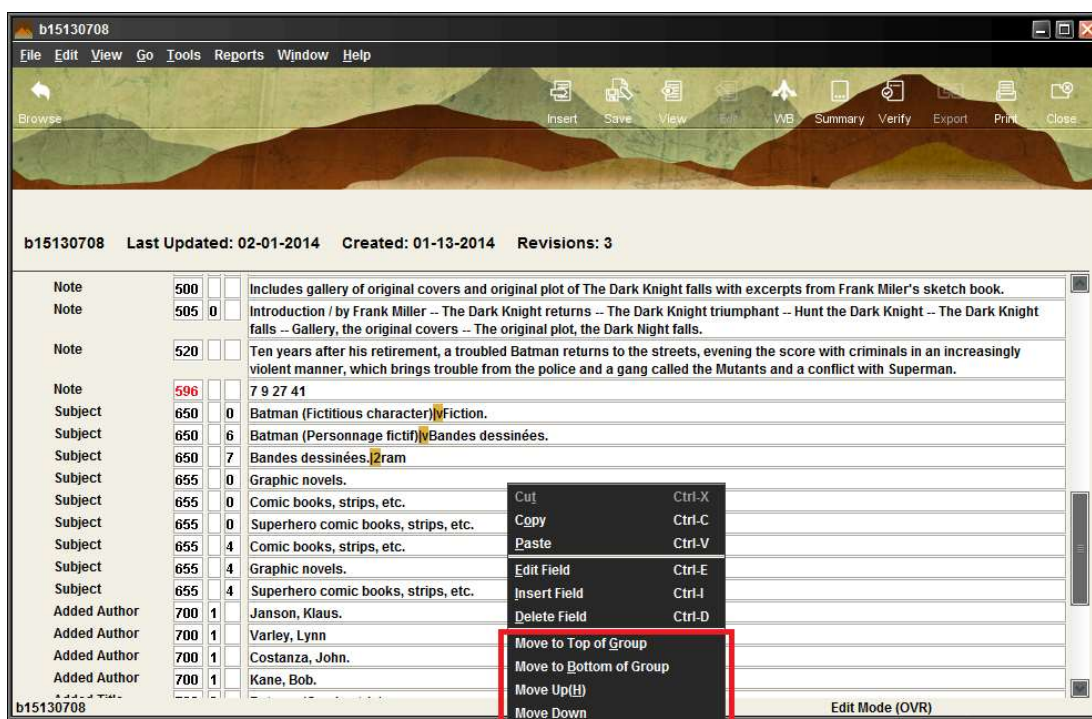
Entering Diacritics

To enter diacritics, select **Tools > Character Map** from the top menu of the bibliographic record. Select the proper Code Chart (most standard accents are in the **Latin-1 Supplement chart**), and then select your diacritic and click on Insert.



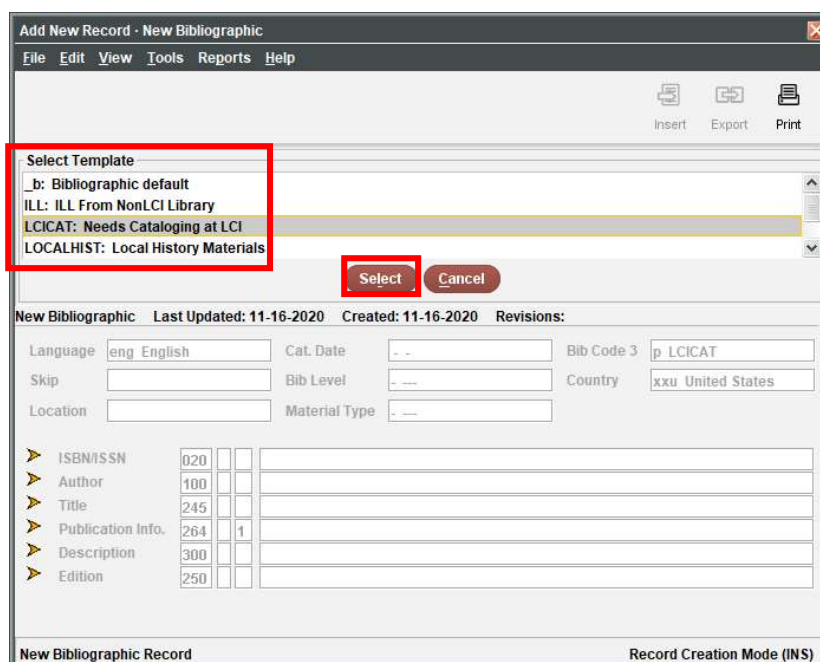
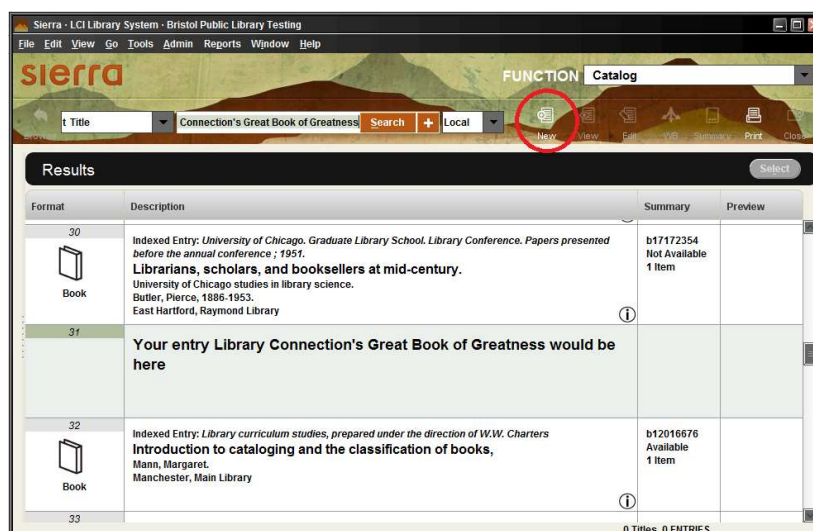
Moving MARC Fields Up and Down

Right click on the field you want to move, and select one of the Move options. Note that Move to Top/Bottom of Group options will move it to the top or bottom of similar fields (such as moving a subject to the top of the list of subjects). If a field is moved out of a group of similar fields, when you save the record, it will be moved back into that group.



Creating New Bibliographic Records

After searching to verify that there is not already a bibliographic record for this item, click on **New** within the Catalog function, select a template, and click on Select.



Template Options

Some templates available for use by all libraries include:

ILL: Use for items from outside of LCI libraries that are being checked out by LCI patrons.

LCICAT: Use for brief items that need cataloging by LCI staff.

LOCALHIST: Use for local history items that will not be placed on OCLC and do not need original cataloging by LCI staff.

REALIA: Use for items such as museum passes, puppets, games, etc.

TempRecord: This is used primarily by circulation staff when they try to check out an item and the barcode is not found.

Filling out the Template

Fill out whatever fields the template prompts you for. For fixed fields, double click on the coding box to see the complete list of options, hit the space bar to see a drop-down list, or just type in the code if you know it. Note that once you complete the Sierra fixed fields, the prompt field will jump to the top of the

screen for the standard MARC fields. Use standard cataloging practices to enter MARC fields, using | to enter in subfields. There is no “Back” option during the template process. You must finish the template process, save the record, and then go back and fix any mistakes or omissions by editing the record.

Add New Record - New Bibliographic

File Edit View Tools Reports Help

Insert Save Verify Export Print Cancel

New Bibliographic Last Updated: 04-02-2014 Created: 04-02-2014 Revisions:

Language eng English Cat. Date Bib Code 3 p PKCAT

Skip Country xxu United States

Location

Standard No. 020

Author 100

Title 245

Publication Info. 260

Description 300

Edit Data

Material Type

Next Cancel New Record Creation

New Bibliographic Record Record Creation Mode (OVR)

Duplicate Checking

When you enter either a Standard No. or a title, you may see a screen recommending possible duplicates of the item you are entering in. If you find an actual duplicate, use that record instead of the record you are creating. Open the appropriate bib record summary and click on Use Bib.

Duplicate record(s) found - b18586740

File Edit View Go Tools Window Help

Duplicate record(s) found

Browse i Standard no. 0780250737 Search +

Insert Save All View WB Summ

b18586740

Author Cowley, Joy.

Title Library day / by Joy Cowley ; [illustrations by Deirdre Gardiner].

Summary

Record i40984333

Item-Level Holds 0

Bib-Level Holds 0

View a All

Cancel New Record Creation Use Bib Select

#	Record Number	DESCRIPTION
✓ 1	i40984333	Location:8mcch Call No.:PJJ RED Volume: Barcode:32502120416778

i40984333 Outside of scope 1 Attached Records

Adding an Item Record

If you have not just added a bibliographic record using a template, open the summary of a bibliographic record and select **Attach New Item**.

The screenshot shows the 'Summary' screen for a bibliographic record with ID b16466366. The record details are: Author: Bristol Public Library, Title: Library dedication ceremony [videorecording]. The 'Summary' tab is active, showing a table with two item records. The first item record is selected, and the 'Attach New Item' button is highlighted with a red circle.

#	Record Number	Location	Call No.	Volume	Barcode
1	132454764	2marf	LHR 974.63 B77		32519104541678
2	132454776	2marf	LHR 974.63 B77		32519104541660

If you have just completed a bibliographic record template process, the system will automatically trigger a new item template. If you do not want the bibliographic template process to automatically trigger a new item template, go to **Admin > Settings > New Records**, and then uncheck Item at the bottom of the screen, next to Records to Attach to New Bibliographic Records. Remember that you must save your Settings changes, log off and log back in for this change to take effect.

Select an item template and click on Select. The three templates that all libraries can use are:

ILL Item: For an ILL item from outside of LCI libraries. These items are suppressed in the OPAC and should be deleted when the item is returned.

Item Record – Permanent: Use this for all other items.

On-the-fly At Circ: This should only be used at the circulation desk for items with barcodes that aren't in the system.

The screenshot shows the 'New Item' screen for a bibliographic record with ID b17194933. The record details are: Author: Cowell, Cressida, Title: How to twist a dragon's tale : the heroic misadventures of Hiccup the Viking / as told to Cressida Cowell. The 'New' tab is active, showing a 'Select Template' dropdown menu. The 'Select' button is highlighted with a red circle.

Copy No.	Item Code 1	Item Code 2	Item Type	Last Checkin	Checkin Location	No. of Renewals	No. of Circulations	Location	Loanrule	Status	Internal Item
	10860	Suppressed	107					2moca Bristol, Main Lib			

Fill out the item template by following the prompts. Double click on coded fields to see options. Item fields are as follows:

FIXED FIELDS

Copy No.: If you have more than one copy of the same item (not multiple volumes), put the copy number in this field.

Item Code 1: A code for statistical purposes representing audience, format, and genre information. See [Item Code1 Chart](#) and [How to Construct Item Code1](#) on the LCI website

Item Code 2: Used for marking items for suppression and discarding.

Item Type: Governs circulation policies (does not display in the OPAC). Item types are grouped based on format. Click on the right side of the box (description) to see the list of options in alphabetical order by description.

Price: Will be used to charge patrons if the item is lost. If this is left blank, the system will fill in a default price that has been designated for your library.

Location: The five-character code for where the item is shelved. The template should take you to the first location code for your library. For an easy dropdown list of the rest of your library's codes, click (not double-click) on the location description and press the spacebar.

Item Message: A pre-coded message that will appear to staff whenever the item is retrieved in the staff client.

Item Agency: Represents the library system that owns the item, grouping together multi-branch libraries into the same agency.

VARIABLE-LENGTH FIELDS

After the item template has been completed and saved, to add a variable-length field that is not already in the item record, select **Insert** at the top of the item screen.

New Item

File Edit View Go Tools Window Help

Browse Insert Save View Edit WB Summary Export Print Close

b17194933

Author Cowell, Cressida

Title How to twist a dragon's tale : the heroic misadventures of Hiccup the Viking / as told to Cressida Cowell.

Publication Info New York : Little Brown & Co., 2008

Summary New

Item-Level Holds 0

Bib-Level Holds 0

Copy No.		Last Checkin	- - :	Location	2moca Bristol, Main Libr
Item Code 1	10860	Checkin Location		Loanrule	
Item Code 2	n Suppress	No. of Renewals		Status	
Item Type	107 Book - ILL	No. of Overdues		Internal Use	
Price	\$0.00	Overdue Date	- -	Copy Use	
Checkout Date	- - :	Item Use 3		Item Message	r Route to ILL
Checkout Location		Recall Date	- -	OPAC Message	
Due Date	- -	Total Checkouts		Year-to-Date Circ	
Patron No.		Total Renewals		Last Year Circ	

New Item Record Edit Mode (OVR)

Next, select the proper field in the dropdown list, fill out the field, and then click on OK.

Barcode: The item barcode, which can just be scanned in.

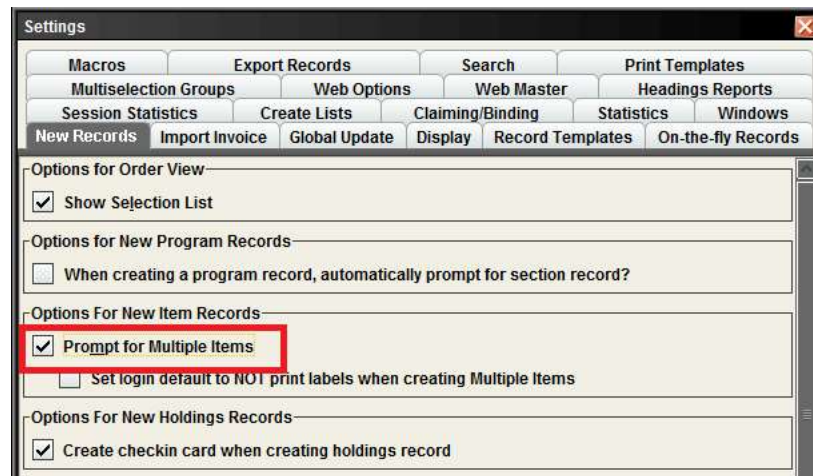
Call No.: The item call number.

Volume: Volume information for multi-disc DVD or Blu-ray sets that have been split into individual items and for titles that are published continuously or are complete in a definite number of volumes, for example encyclopedias, magazines, annuals, yearbooks, almanacs, stamp guides, biographies or autobiographies in multiple volumes, etc. The presence of volume information triggers the OPAC to set holds to item-level holds rather than title-level holds. If you circulate multi-disc DVD sets individually, enter each disc separately ("DISC 1"). If you circulate sets together, DONOT enter the number of discs ("DISC 1-5") in the volume field, instead enter it at the end of the call number.

Message: A message that will show to staff anytime the item is retrieved in Sierra. Unlike the fixed-field Item Message, this message is not pre-determined and can be whatever you type in.

Adding Multiple Items into One Bibliographic Record

To turn on the option to prompt for multiple item creation, go to **Admin > Settings > New Records** in the top menu. Select Prompt for Multiple Items. Click on OK.



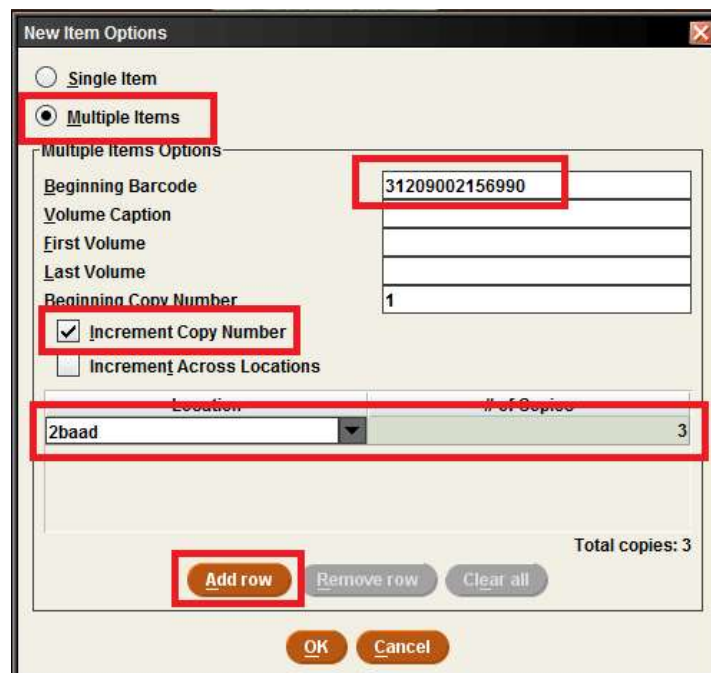
The screenshot shows the 'Settings' dialog box with the 'New Records' tab selected. The 'Options For New Item Records' section is expanded, and the 'Prompt for Multiple Items' checkbox is checked and highlighted with a red box. Other options include 'Show Selection List' (checked), 'When creating a program record, automatically prompt for section record?' (unchecked), 'Set login default to NOT print labels when creating Multiple Items' (unchecked), and 'Create checkin card when creating holdings record' (checked).

Now when you attempt to add an item, you will see the New Item Options box where you can select Single Item or Multiple Items. Put the first barcode in the Beginning Barcode field.

If entering multiple volumes, enter the volume text (such as "Disc" or "V."), and the first and last volume number. Uncheck Increment Copy Number.

If entering multiple copies, leave Volume Caption, First Volume, and Last Volume blank, and keep Increment Copy Number checked. Only change Beginning Copy Number if you do not want to start at copy 1.

Set the desired location and the total number of copies, and click on OK.



The screenshot shows the 'New Item Options' dialog box. The 'Multiple Items' radio button is selected and highlighted with a red box. The 'Multiple Items Options' section is expanded. The 'Beginning Barcode' field contains '31209002156990' and is highlighted with a red box. The 'Beginning Copy Number' field contains '1'. The 'Increment Copy Number' checkbox is checked and highlighted with a red box. The 'Location' dropdown menu is set to '2baad' and the '# of Copies' field is set to '3', both highlighted with a red box. The 'Add row' button is highlighted with a red box. The 'Total copies: 3' label is visible at the bottom right. The 'OK' and 'Cancel' buttons are at the bottom.

Confirm the results and click on Yes. Make sure you peel the barcodes off of the sheet of barcodes in the proper order (do not peel them off in a random order that makes a fun pattern).

Copying an Item Record

To create a copy of an item record, go to the individual item record (not the Summary record) and select **Edit > Copy Record** in the top menu bar.

The screenshot shows the 'i25810480' window with the 'Edit' menu open. The 'Copy Record' option is highlighted with a red box. Below the menu, the item record details are visible, including 'Not checked out', 'Last Updated: 01-13-2014', 'Created: 01-13-2014', and 'Revisions: 1 (Not In Scope)'. The record details include fields for Copy No., Item Code 1, Item Code 2, Item Type, Price, Checkout Date, Checkout Location, Due Date, Patron No., Last Checkin, Checkin Location, No. of Renewals, No. of Overdues, Overdue Date, Item Use 3, Recall Date, Total Checkouts, Total Renewals, Location, Loanrule, Status, Internal Use, Copy Use, Item Message, OPAC Message, Year-to-Date Circ, and Last Year Circ.

Next select the desired item template (usually the Permanent item template) and click on Select.

The screenshot shows the 'New Item' window with the 'New' tab selected. The 'Select Template' dropdown menu is open, and the 'Item record-Permanent' option is highlighted with a red box. Below the dropdown, the 'Select' button is also highlighted with a red box. The record details include fields for Copy No., Item Code 1, Item Code 2, Item Type, Price, Last Checkin, Checkin Location, No. of Renewals, No. of Overdues, Overdue Date, Item Use 3, Recall Date, Total Checkouts, Total Renewals, Location, Loanrule, Status, Internal Use, Copy Use, Item Message, OPAC Message, Year-to-Date Circ, and Last Year Circ.

Check the new item information for accuracy, add a barcode, and click on Save.

Item Deletion – Single Item

Immediate Item Deletion

To immediately delete an item, select it in the Summary list and click on Delete. You cannot delete items from other libraries. **NOTE: LCI cannot provide statistics on these immediate deletions.**

The screenshot shows the LCI Summary screen for item b17194933. The 'Summary' tab is active. On the left, there are statistics for 'New', 'Item', 'Item-Level Holds', and 'Bib-Level Holds'. The main area displays a table of 21 attached item records. The 'Delete' button in the top right of the table area is circled in red.

#	Record Number	Location	Call No.	Volume	Barcode
1	i35455548	SWCCII	J COWELL		3252011000880
8	i3545555x	4mcch	J F COWELL		32540117146396
9	i35455561	cacch	J FICTION COWELL		32531116173051
10	i35455573	cacch	J FICTION COWELL		32531116173168
11	i35455585	chcch	J FICTION COWELL		31209114739048
12	i35455597	crch	J FIC COWELL		32543118841627
13	i35455603	crch	J FIC COWELL		32543121252309
14	i35455615	plcch	J COWELL		32535119077243
15	i35455627	plcch	J COWELL		32535118248142
16	i35455639	bucch	JF COW		32532116141502
17	i35455640	cocch	J COW		33230119782328
18	i35455652	bpcch	J FICTION COWELL		32525120735244
19	i35455664	3mcch	J COWELL		32523120779767
20	i4710983x	socch			32515096670038
21	New Item	2moca			

21 Attached Item Records

Then click on Yes.

The screenshot shows the LCI Summary screen for item b17194933. A 'Delete Record(s)' dialog box is open, asking to delete record i35455500. The 'Yes' button in the dialog is circled in red.

#	Record Number	Location	Call No.	Volume	Barcode
1	i35455482				32505113118244
2	i35455494				32509111713352
3	i35455500				32512112610445
4	i35455512				32542111538198
5	i35455524				32542116503270
6	i35455536				32529112832266
7	i35455548				32526116606886
8	i3545555x				32540117146396
9	i35455561				32531116173051
10	i35455573	cacch	J FICTION COWELL		32531116173168
11	i35455585	chcch	J FICTION COWELL		31209114739048
12	i35455597	crch	J FIC COWELL		32543118841627
13	i35455603	crch	J FIC COWELL		32543121252309
14	i35455615	plcch	J COWELL		32535119077243
15	i35455627	plcch	J COWELL		32535118248142

21 Attached Item Records

Marking an Item for Discard

Items that you remove from your collection can be marked for discard, which will suppress them in the OPAC and they will be deleted at the end of the month by LCI staff. Go to the Summary of the bibliographic record, select the desired item in the list, and click on the Record tab on the left.

#	Record Number	Location	Call No.	Volume	Barcode
1	i38594699	glaad	641.555 CORA		32512118332473
2	i38594705	caaad	641.555 CORA		32531117060679
3	i38594717	weanf	641.555 CORA		32514119541930
4	i38594729	bpaad	641.555 CORA		32525114532342
5	i38594730	6maanf	641.555 CORA		32505118072847
6	i38594742	2maad	641.555 C81		32519117781444
7	i38594754	5maad	641.555 CO		32505119499146
8	i38594766	neaad	641.555 CORA		32510109685438
9	i38594778	6banf	641.555 CORA		32505121468656
10	i47024811	soaad	641.555 CORA		32515096463525

Then double-click on Item Code 2 and set that to either **Discard**, **Discard Last Item**, or **Discard Ordered Copy**. Click on **OK**, then click on **Save**.

Select

- Discard (d)
- Discard Last Copy (l)
- Discard Ordered Item (o)
- East Hartford Storage (e)
- Gap recs (g)
- Suppress (n)

OK **Cancel**

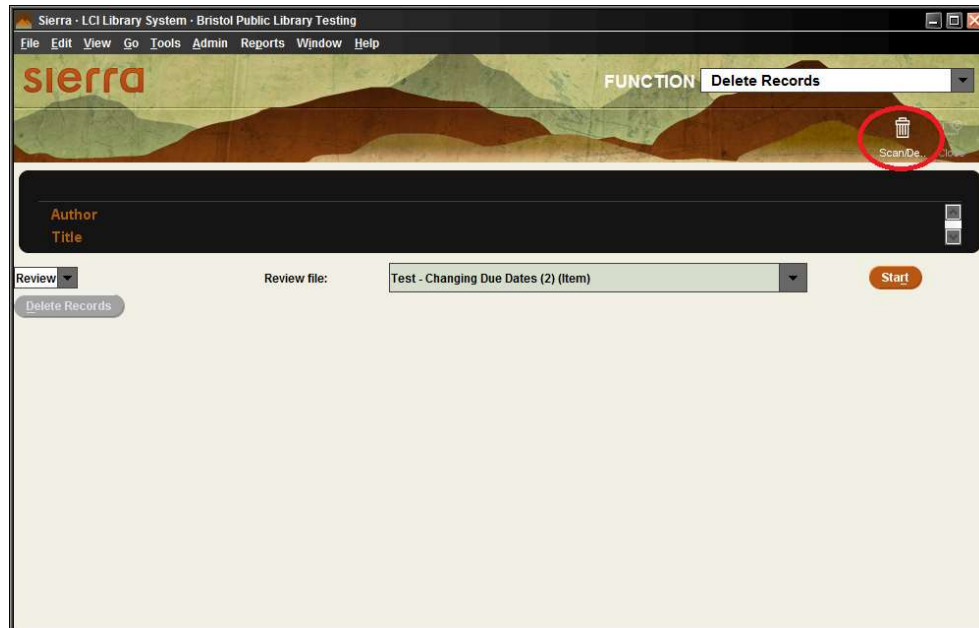
Any item marked for discard will be deleted from the system by LCI on the second to last business day of the month and a report sent to the libraries.

Item Deletion – Multiple Items

Immediate Item Deletions

NOTE: You cannot delete items from other libraries and **LCI cannot provide statistics on these immediate deletions.**

Select the Delete Records function in the Function drop-down menu. Click on the Scan/Delete button.



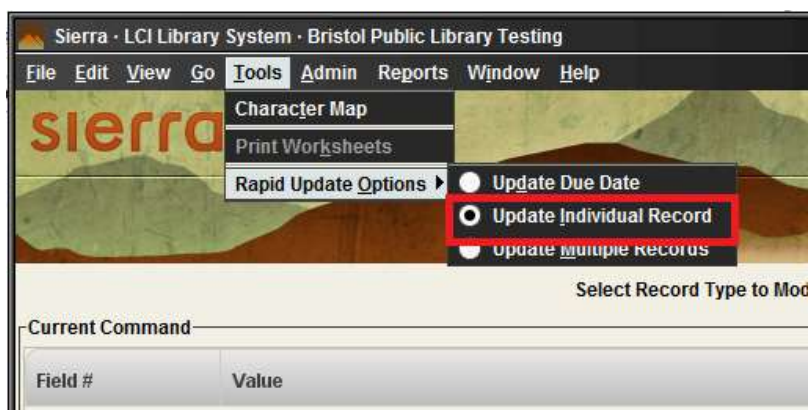
Scan the items in that you want to delete, and then click on Delete Items.



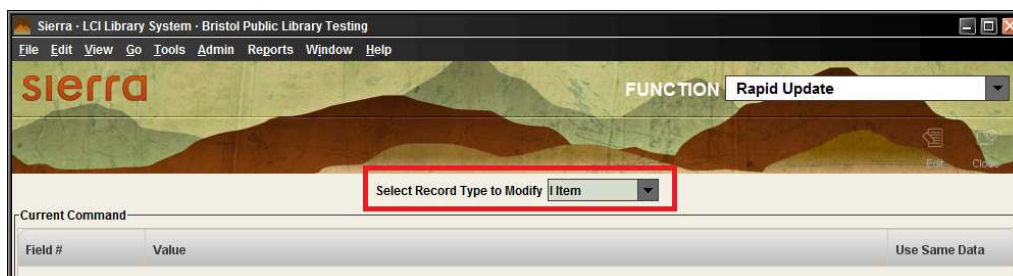
Marking Items for Discard

Items that you remove from your collection can be marked for discard, which will suppress them in the OPAC and they will be deleted at the end of the month by LCI staff.

Select the Rapid Update function in the Functions drop-down menu. In the top menu, select **Tools > Rapid Update Options > Update Individual Record**.



Change the “Select Record Type to Modify” option to Item.



Double-click on Field and select Item Code 2.

Record #: Field: Value:

Double-click on Value and select the appropriate discard option.

Record #: Field: Value:

Enter a barcode into the Record # field (overwriting the “.i” that is currently there) and type Enter **twice**, at which point the item should appear in the below History field.

Current Command

Field #	Value	Use Same Data
60 Item Code 2	d	☒

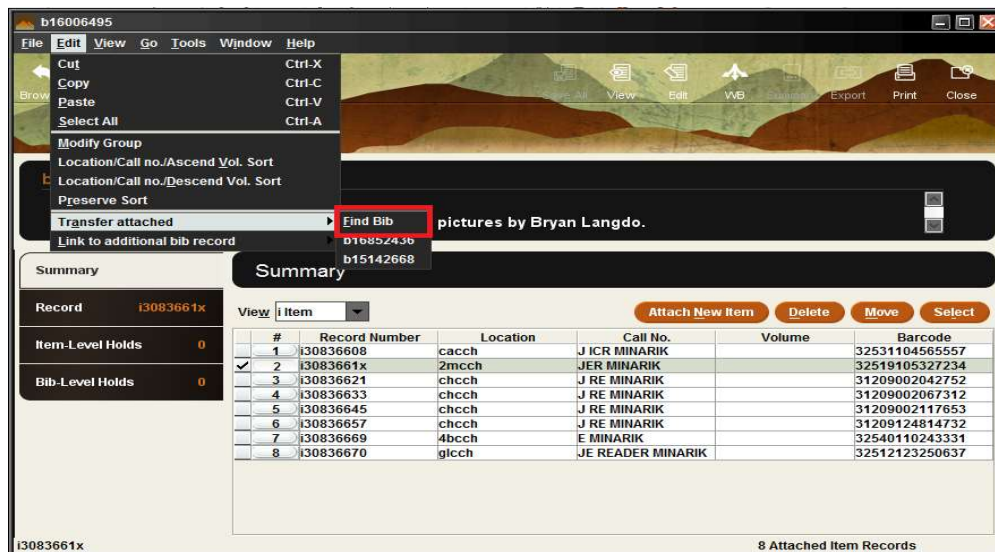
Record #: Field: Value:

History

#	Record No.	Details	Status
1	131285879	60 Item Code 2 = d;	Processed

Transfer Item to Different Bib Record

Either go to the individual item record for the item you want to transfer or select it in the Summary list. Click on **Edit > Transfer attached > Find Bib**.



Search for the desired bib record and in the Summary screen, and click on Use Bib. This will transfer item records and holds to the selected bib record.

