REQUESTS FOR CORRECTION, ADDITION, OR ASSISTANCE

The following guidelines are to help determine which Collection Services and Development (CSD) or other system department can best assist with "problems" and questions regarding library materials, barcodes, and other services.

DEPARTMENT TO CONTACT

Barcode label is missing or damaged: *   CATALOGING
 At this time, there is no way to determine the owning agency for an item with no known item number. Forward such items to the book sale.

Adding author gift materials to the collection: * COLLECTION DEVELOPMENT

Adding "continuation" materials to the collection: * COLLECTION SERVICES-RECEIVING

Recently received materials with defects: * COLLECTION SERVICES-RECEIVING

Assistance with barcode issues: CATALOGING

Requests for changes/corrections to catalog: * CATALOGING

Materials received that are non-MLS: INTERLIBRARY LOAN

* Please route the material in question to the appropriate department.

If uncertain which department should handle a question, contact any Collection Services and Development department. Staff there will assist with the question or with contacting the appropriate department.

WHEN TO REQUEST ASSISTANCE

Some actions may be taken at the library level, and do not require the assistance of a CSD department. Staff at a library may:

Re-inventory a deleted item number;
Change a location code;
Withdraw an item.

Re-Inventory Item (Item Not in Inventory)

Item numbers do not "age out" of the CarlX system. Item numbers for items coded "lost" or "missing" remain in the holdings indefinitely unless they are manually deleted. If a material coded "lost" or "missing" is returned to a library; **and if** the barcode label is in good condition and may be scanned, simply check the item in. This will restore the item to active status.

Library materials for which item numbers were not converted in CarlX may be inventoried at the library level.

When an item number that does not exist in the CarlX database is scanned, the message "Item Number not found" appears. **If** there is a record for the title in the catalog, **and *if*** the barcode label is in good condition and readable, the item may be inventoried at the library.
1. Click the "New" button at the bottom of the screen.
2. Select the option "Add a new item to this Bib record" and click "OK".
3. When the Item Editor dialog box opens, scan or type the item number from the barcode label in the appropriate box.
4. Select Price, Branch, Location, Media, and Status.
    a. **NOTE:** Price must be rounded to the nearest 5 cents.
    b. **NOTE:** When the item is in hand, select the "On shelf" status.
5. Click the "Save" button.

If there is a record in the catalog, ***but*** the barcode label is missing or illegible, follow instructions for sending materials to Cataloging. On the routing slip, mark "item number no longer in system; please add".
If there is no record in the catalog, ***and if*** the barcode is in good condition, the material may be routed to Collection Development. Evaluate carefully before routing. Materials of this type tend to be out of date, and/or contain information already readily available within the system. Materials with deleted records should only be returned to the collection if they meet a need that cannot be met otherwise. To return such materials to the collection:
1. On the routing slip, mark "bib record no longer in system; please evaluate".
2. Route the material to Collection Development.

Change Location Code

1. On the CarlX Item Maintenance screen, highlight the item number.
2. Click the "Edit" button at the bottom of the screen.
3. Select the desired location code from the drop-down menu next to the "Location" box.
4. Click the "Save" button.

HOW TO REQUEST ASSISTANCE

Please help Collection Services and Development to respond to your request and return materials to your collection quickly by following the guidelines below.

General Information

- **Always** make sure a material meets system guidelines for retention or addition to the collection before sending it to any CSD department. CSD departments have the option of withdrawing or discarding any materials not meeting the guidelines.
- **Never** send a material to any CSD department while it is checked out to a customer. Materials must be cleared before any action can be taken. If the material is checked out to a customer and is overdue, the customer will be fined, even though s/he may have returned the material on time. Materials will not be cleared as damaged; this must be done at the agency.
- **Never** send a customer printout to a CSD department. Staff there have no need for this information, and it is an ethical violation for them to have it.
    - The only exception to this is when dealing with missing pieces. Please include a copy of the materials notice that is sent to the customer.
- **Always** follow appropriate procedures for routing materials, whenever the item number is known.
- **Always** make sure to account for all parts of an item before sending. Check the bib record to determine whether the item consists of multiple CDs, includes a book or guide, etc.
- **Always** make sure to include a note and the reason why you are routing the item to a CSD department.

Routing

1. Follow system guidelines for routing materials.
2. Make sure to use a **yellow** routing slip.
3. Include the following information on the routing slip:
    a. Your name or initials.
    b. Nature of the issue (i.e., needs new barcode, duplicate call numbers, etc.)
    c. Special requests such as "rush handling" (i.e., system reserves waiting, needed due to programming, etc.) or need to keep material in spite of condition.

REQUESTS FOR REPLACEMENT OF BARCODE LABEL

If a barcode label cannot be scanned or is damaged, the material may be sent for a replacement label.

Evaluate the condition of the material before routing it for replacement of the barcode label. If the material does not meet system requirements for retention due to condition, do not send.

If material is returned or discovered with the barcode label/pocket removed, try to determine the owning agency and the item number for the material. If the owning library cannot be determined, route the material to the Book Sale.

Send the item to Cataloging with a printout of the **Item Detail** screen or the holdings screen with the item highlighted.

Cataloging **prefers** that the material be placed on hold for Cataloging's card number (02173764) with BM as the pickup location. After placing the hold, fill it and route the material to fill the hold. Items may also be checked out to Cataloging's card.

If it is necessary to avoid checking out the material to preserve circulation statistics, please contact Cataloging for assistance.

Please **do not** change the "Branch" to Cataloging, as this destroys any record of the previous owning agency.

On the printout, note:

1. Your initials

2. The action requested (usually "new barcode")

3. When routing the material, mark the routing slip "New barcode please".

Multi-part sets

At times, one or more parts of a multi-part set (such as an audio tape and book, DVD with guide included, etc.) may be lost. In some cases, a library may opt to keep the remaining part of the set in its collection.

The remaining parts must be able to stand alone and be used without the rest of the set. A book on CD with one CD missing cannot be retained, nor can a 2-disc music CD with one disc missing, etc. In these situations, contact Collection Development for instruction on ordering a replacement.

CDs and DVDs generally include a small booklet tucked inside the front of the plastic case. This "guide" is not noted in the record. If a CD or DVD guide is lost, it is **not necessary** to send the item to Cataloging. Libraries may add a NO GUIDE label (available from Collection Processing) to the front of the case and continue to circulate the item.

If a library wishes to keep part of a set:

1. Withdraw the item number for the set.
2. Determine if the desired material is in system as an individual item (i.e., book only, audio tape only, etc.)
   a. If the material is in system as an individual item, send to CATALOGING with a **bib printout for the individual item**. **Indicate on the printout that the material was formerly part of a set**.
   b. If the material is not in system as an individual item, send to CATALOGING with a **bib printout for the set**. **Make sure to indicate on the printout that the rest of the set is missing and the material is to be added as an individual item.**

REQUESTS FOR EVALUATION OR CORRECTION BY CATALOGING

To request evaluation of or changes to classification, subject headings, catalog records, or barcode labels, complete a "Cataloging Consideration Form". This form is available on the MLS Intranet under the "Forms & Supplies" tab.
When requesting some actions, it is necessary to send a copy of the material with the request; for other actions, it is not. Generally speaking, if the action requested will require the barcode label to be changed, send a copy of the material.
Requests for replacement of barcode label do not require use of a consideration form.
Media, location, and price may be corrected at the library level.
If no copy of the material is sent, please send printouts of any screens that may be useful in demonstrating the problem.

Examples of requests that might be sent on a Cataloging Consideration Form:

- ☐ Request for evaluation/change of Dewey or fiction classification *
- ☐ Request for change of classification level (EASY, READER, etc.) *
- ☐ Request for additional subject headings
- ☐ Request for subject cross references
- ☐ Notice of typographical errors in catalog
- ☐ Notice of conflicting entries (author or subject) in catalog
- ☐ Notice of duplicate call numbers *
- ☐ Notice of corrupted record display – incorrect summaries or eBook links that are no longer active.

  * Requires a copy of the material(s) involved.

If uncertain which department should handle a question, contact any Collection Services and Development department. Staff there will assist with the question or with contacting the appropriate department.

Cataloging – cataloging@metrolibrary.org
Collection Development – matselection@metrolibrary.org
Interlibrary Loan – interlibraryloan@metrolibrary.org
Collection Processing - galen.boydstun@metrolibrary.org