Do not use the triage flag or this triage process for current cataloging problems (e.g. materials newly received, whether PromptCat or not). For current cataloging issues, follow standard procedure and create a BadCat ticket and do not send material until requested.

What to Resolve at the Subject Specialty Library

- No item record in Millennium
  - search Millennium by barcode to verify it isn't in use in another record
  - with material in hand, perform an exact match bibliographic check – all of these elements must match:
    - title
    - author
    - edition
    - pagination
    - place of publication & publisher
    - publication/copyright date
  - if matched, add item record
  - if not matched, do another search by author and/or title to locate another possible exact match bibliographic record in the database
    - if there is another record, perform exact match bibliographic check. If successful, add item there
  - if there is not another record, see section "What to send to Catalog & Metadata Services" in this document.

- Update holdings statements
  - Is material in hand an MVM or a serial volume?
    - If a serial, follow serial holdings standards
    - If an MVM, answer these questions:
      - a) Are you withdrawing ALL of the volumes?
      - b) Are you sending ALL of the volumes to NRLF?
      - c) Are you transferring ALL of the volumes?
        - If yes to either a) or b) or c) do not update holdings statement
      - d) Are you withdrawing only SOME of the volume
      - e) Are you sending only SOME of the volumes to NRLF?
      - f) Are you transferring only SOME of the volume(s)?
      - g) Are you adding volume(s) that were on the shelf but not in the record?
        - If yes to either d), e), f) or g), update the holdings statement (866 / Library Has)

- Duplicate barcode: the barcode on the volume appears in two or more item records on <u>one</u> bibliographic record
  - Retain the item record with the most and most accurate information – usually this is the one that contains migration data
  - Delete the other item record(s) that also have this barcode, UNLESS
    - the barcode appears in an item record for a different volume number/year (if a serial or MVM)
    - if that's the case, find the material representing the different volume number
    - with the volume in hand, verify its barcode against the item record, correct as needed

- Duplicate barcode: same barcode appears on the volume **and** in two or more item records on <u>two or more</u> bibliographic records in Millennium
  - o Is this an analytic? If so, see "What to report to BadCat"
  - o If it is not an analytic, obtain volume(s) for each item and bibliographic record, verify barcodes, and determine whether problem can be resolved at SSL
  - o If it cannot be resolved or if you are uncertain, see "What to report to BadCat" in this document

- NRLF reject – material already accessioned in NRLF
  - o SSL decides whether to retain, withdraw, transfer, etc.

- NRLF reject – bibliographic problem
  - o See section "What to send to Catalog & Metadata Services" in this document.

- Transfers
  - o Is this an analytic?
    - § If yes, If so, see "What to report to BadCat"
    - § Remember: all titles with analytics should be referred to BadCat **before** doing any transfer work on *any* of the material (e.g. any vols if title is a serial or MVM). Do not send material to BadCat until requested.
  - o Single volume monographs (SVM) and Multi-volume monographs (MVM) – follow written procedures online at: http://www.lib.berkeley.edu/asktico/procedures/transfer-procedures-monographs
  - o Serials

- Withdrawals
  - o Is this an analytic?
    - § If yes, If so, see "What to report to BadCat"
    - § Remember: all titles with analytics should be referred to BadCat **before** doing any withdrawal work on *any* of the material (e.g. any vols if title is a serial or MVM). Do not send material to BadCat until requested.
  - o Follow procedures online at: http://www.lib.berkeley.edu/asktico/procedures/withdrawal-procedures
  - o Noted problems: staff not closing serial check-in records correctly

What to report to BadCat

- Location problems (e.g. zzzzz, location code SSL can't edit, etc.)
  - o *Except* for **location=none** - these must be reported to the OskiCat Help Desk (not BadCat)

- Call number problems (e.g. duplicate call numbers, wrong classification, mismatched call numbers for multiple copies of same material at your location, etc.)

- Anything involving analytics, for example:
  - o Transfers
  - o Withdrawals
  - o Reinstatements
  - o The same barcode in two different item records (each with its own item record number)
  - o Except! Unlinked analytics: You may wish to track the bibliographic record number for the set record, for future resolution. <u>Do not report these to BadCat</u>.

Remember: all titles with analytics should be referred to BadCat **before** doing *any* transfer, withdrawal, or reinstatement work on *any* of the material (e.g. any vols if title is a serial or MVM). Do not send material to BadCat until requested.

- Complex problems that cannot be resolved at the SSL

What to send to Catalog & Metadata Services

Do not use the triage flag or this triage process for current cataloging problems (e.g. materials newly received, whether PromptCat or not). For current cataloging issues, follow standard procedure and create a BadCat ticket, and do not send material until requested.

NOTE: always fill out the colored triage flag for your location, then insert the flag into the material before sending to C&MS. Do not create a BadCat ticket.

Bibliographic problems: (LSCP = large scale collections project)
- NRLF reject – bibliographic problem
  - Add tracking note: %date LSCP triage sent to C&MS [initials]
  - Change item record Status to 'p' In Process
  - Send item with completed triage flag to C&MS and also send ALL paperwork from NRLF included with the material.

- No BIB record in Millennium
  - If material is to be retained anywhere in the Library's collection (same location or other), create an OTF record
  - Add tracking note: %date LSCP triage sent to C&MS [initials]
  - Change item record Status to 'p' In Process
  - Send item with completed triage flag to C&MS

- Incorrect/mismatched bibliographic record
  - Add tracking note: %date LSCP triage sent to C&MS [initials]
  - Change item record Status to 'p' In Process
  - Send item with completed triage flag to C&MS