

## SECTION IV: GENERIC AND PERM RECORDS

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### Part 1 – Generic Records Bibliographic Short Entry

#### **A. When to create Generic Records**

You will create Generic Records to link groups of items for which you do not need title access. Also, Generic Records are suppressed from LINKcat. Examples of types of materials that get generic records are equipment, rental items, browse collections, die cuts, and materials in brand-new formats. See the Levels of Cataloging policy (<https://www.scls.info/ils/policies/cat/levelsofcataloging-policy.html>) for a list of the types of materials for which you should use generic records.

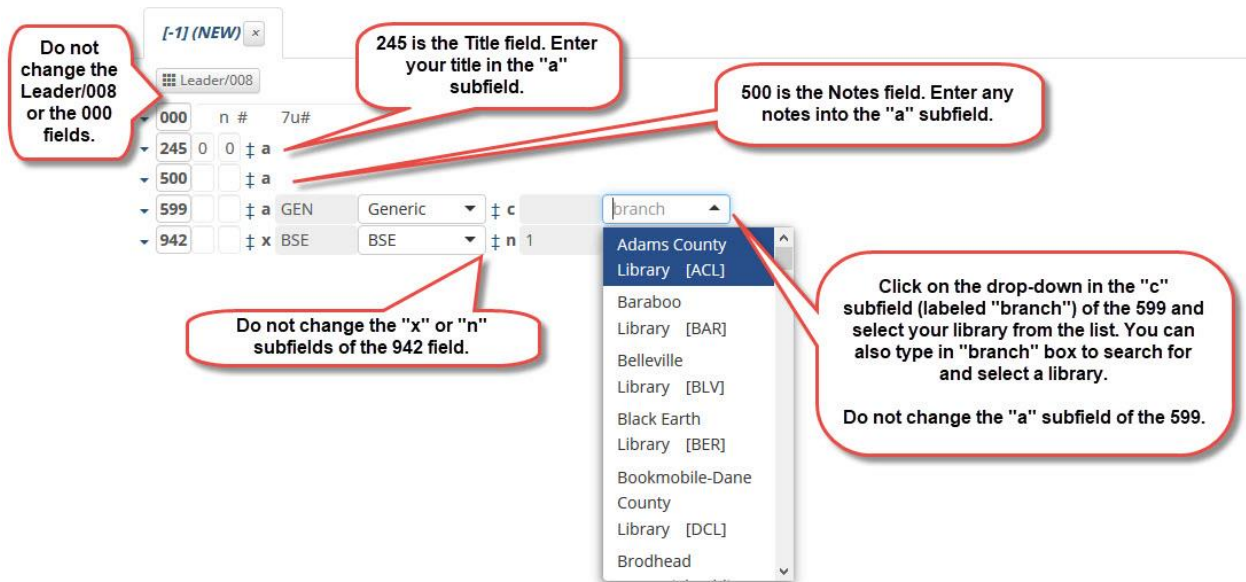
The Generic Bibliographic Records template is very brief because full cataloging is not needed. You should try not to link more than 100 items to a single bibliographic record, because it will slow down access to that record. If you need to link more than 100 items to a single record, then you can duplicate the record. (See *Section X: Editing and Duplicating BSE Records.*)

#### **B. Creating and saving GENERIC BSE records**

1. Go to **More>Cataloging Editor** or click the **Cataloging Editor** link from the Bibliovation home page.
2. Under **Create a new record** click **from template**.
3. The **Create a New Record** box will pop-up. **MARC Bibliographic** should be selected in the first box.
4. In the **From template** box, select **GENERIC BSE** and click the **Create New** button.
5. A blank **GENERIC BSE** template will display.
6. Enter the information about the item into the GENERIC BSE template. The graphic below explains the labels and types of fields that are part of the GENERIC BSE. **Detailed information on entering data into the GENERIC BSE template is presented after the graphic in Parts C and D.**
7. When finished, click the orange **Save** button in the upper right-hand corner of the screen. A **Suppressed** box will appear at the top of the screen, because all GENERIC records are suppressed from LINKcat.
8. To get back to the Detail screen, click the “arrow” icon next to **Active catalog record**.



record type:  
Status: Active Catalog Record 



### **C. Entering data in GENERIC BSE records for materials other than die cuts**

See below for information about entering data into the GENERIC BSE template for materials other than die cuts.

#### **Leader/008 field** *(do not change)*

Do not change any data in this field.

#### **000 field** *(do not change)*

Do not change any data in this field.

#### **245 field TITLE** *(required)*

Click in the “a” subfield, and enter the title for the GENERIC record in the format described below. *All titles for generic records should be entered in the following format:*

“GENERIC” “type of item” — “library name” in all capital letters. Examples:

GENERIC LUCKY DAY--OREGON  
 GENERIC EQUIPMENT--WISCONSIN DELLS  
 GENERIC MAGAZINES, JUVENILE--MONONA  
 GENERIC TOYS--LODI  
 GENERIC DVDS--BLACK EARTH

#### **500 field NOTES** *(optional)*

Click in the “a” subfield, and enter miscellaneous information pertaining to the bibliographic record. (Do not enter information specific to the items here.)

#### **599 field TYPE and LIBRARY** *(required)*

Do not change the “a” subfield. By default, GEN will appear in this field. In the “c” subfield (labeled **branch**), click on the drop-down and choose your library from the list. You can also type into the box

labeled **branch** to search for and select your library.

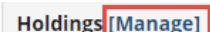
**942 field** (*do not change*)

Do not change any data in either the “x” or “n” subfields. These subfields tell the system that 1) the bib is a BSE and 2) the bib should be suppressed from LINKcat.

**ITEM RECORDS**

(For more detailed instructions for adding item records, see Section XII: Linking Items.)

To add item records, click the **Manage** link, next to Holdings, at the top of the screen.



**CALL NUMBER field** (*required*)

The call number field on the item record may be used to identify the item more specifically. For example, “HEADPHONES” could be entered as the call number for a pair of headphones that circulate on a GENERIC EQUIPMENT record. The title (and author if appropriate) of the book or DVD could be entered into the call number field on for a book that is circulating on a GENERIC record as part of a Lucky Day/browse collection.

NOTE: It is recommended that a maximum of 100 items be on GENERIC records in order to help prevent slow loading times. A new generic record should be created if the number of items on one record exceeds 100.

**D. Entering data in GENERIC BSE records for die cuts**

See below for information about entering data into the GENERIC BSE template for die cut materials. Before entering a new GENERIC BSE record for your die cut, you should search for a matching record. If you find a matching record, you can link your item to the record. (See **Section E Searching for GENERIC records in Bibliovation** for information on searching for GENERIC BSE records.)

**Leader/008 field** (*do not change*)

Do not change any data in this field.

**000 field** (*do not change*)

Do not change any data in this field.

**245 field TITLE** (*required*)

Click in the “a” subfield, and enter the title for the GENERIC record in the format described below. *All titles for die cut generic records should be entered in the following format:*

SHAPES OTHER THAN LETTERS OR NUMBERS

GENERIC DIE – “shape” in all capital letters. Examples:

GENERIC DIE – APPLE  
GENERIC DIE – DOLPHIN  
GENERIC DIE – FLOWER

LETTERS

NOTE: Each set of letters with the same font and size will have a separate bib record.

GENERIC DIE – ALPHABET <FONT> <SIZE>

GENERIC DIE – ALPHABET TRAVELER 2 INCH

## NUMBERS

*NOTE: Each set of numbers with the same font and size will have a separate bib record.*

GENERIC DIE – NUMBERS <FONT> <SIZE>

GENERIC DIE – NUMBERS TRAVELER 2 INCH

*Do not include the library agency code in the title.*

All libraries will be able to link their die cuts to the record for the same shape.

### **500 field NOTES** (*do not use*)

Do not enter information into the NOTES field for die cuts.

### **599 field TYPE and LIBRARY** (*required*)

Do not change the “a” subfield. By default, GEN will appear in this field. In the “c” subfield (labeled **branch**), click on the drop-down and choose your library from the list. You can also type into the box labeled **branch** to search for and select your library.

### **942 field** (*do not change*)

Do not change any data in either the “x” or “n” subfields. These subfields tell the system that 1) the bib is a BSE and 2) the bib should be suppressed from LINKcat.

## **ITEM RECORDS**

*(For more detailed instructions for adding item records, see Section XII: Linking Items.)*

To add item records, click the **Manage** link, next to Holdings, at the top of the screen.

Holdings [\[Manage\]](#)

### **CALL NUMBER** (*required*)

For shapes other than letters or numbers, enter the following information into the call number field:

- Manufacturer name (e.g. ACCUCUT, ELLISON)
- Shape
- Manufacturer’s product number
- Example: ACCUCUT DIE WORM W1505L
- Example: ELLISON DIE SUITCASE 14979-LG

For letters, enter the following into the call number field:

- Case (e.g. Uppercase)
- Letter or set of letters (e.g. AEIOU)
- Example: UPPERCASE Z
- Example: LOWERCASE AEIOU

For numbers, enter the following into the call number field:

- Number or set of numbers (e.g. 123)
- Example: 9
- Example: 123

### E. Searching for GENERIC records in Bibliovation

The call number field is searchable in the keyword search. If you enter titles, authors, etc. into the call number field of the item record, you can combine those terms with the word **generic** to return generic bib records.

Search examples for generic bibs:

- **generic still me moyes jojo** [author and title in call number field]
- **generic the handmaid's tale atwood** [author last name and title in call number field]
- **generic little fires everywhere** [title in call number field]

Search examples for generic dies:

- **generic die <shape>**
  - Example: **generic die caboose**
  - Example: **generic die apple**
- **generic die alphabet** or **generic die numbers** (include font and size information if desired)
  - Example: **generic die alphabet lollipop**
  - Example: **generic die numbers**
- manufacturer's number of generic die
  - Example: **14979-LG**

## Part 2 – PERM Records Bibliographic Short Entry

### **A. When to use PERM Records**

You will use PERM bibliographic short entry records to provide title access certain types of items that do not receive full OCLC MARC cataloging. Examples are cassettes, VHS tapes, toys, seeds, daycare kits, software that is more than five years old, self-published materials by local authors (all formats, including books, sound recordings, etc.), mobile hotspots, and streaming devices. See the Levels of Cataloging policy (<https://www.scls.info/ils/policies/cat/levelsofcataloging-policy.html>) for a list of the types of materials for which you may use PERM records. PERM records are searchable by patrons in LINKcat.

### **B. Creating and Saving PERM records**

1. Go to **More>Cataloging Editor** or click the **Cataloging Editor** link from the Bibliovation home page.
2. Under **Create a new record** click **from template**.
3. The **Create a New Record** box will pop-up. **MARC Bibliographic** should be selected in the first box.
4. In the **From template** box, select **PERM BSE** and click the **Create New** button.
5. A blank **PERM BSE** template will display.
6. Enter the information about the item into the BSE template. **Detailed information on entering data into the PERM BSE template is presented below in Part C.**
7. When finished, click the **Save** button on the right side of the screen.

### **C. Entering data in PERM BSE records**

See below for information about entering data into the PERM BSE template. Also, if necessary you can refer to the appropriate Bibliographic Short Entry section for guidelines on fields not listed below (e.g. for cassettes, refer to *Section VII: Sound Recordings*).

#### **Leader/008 field** *(do not change)*

Do not change any data in this field.

#### **000 field** *(do not change)*

Do not change any data in this field.

#### **008 field** *(do not change)*

Do not change any data in this field.

#### **010 field Library of Congress Control number** *(optional, books only)*

Click in the “a” subfield, and enter a Library of Congress Control number, if there is one available on your item in hand. Otherwise, leave this field blank.

#### **020 field ISBN** *(required if applicable)*

Click in the “a” subfield, and enter an ISBN, if there is one available on your item in hand. Otherwise, leave this field blank.

#### **100 field PERSONAL AUTHOR** *(required if applicable)*

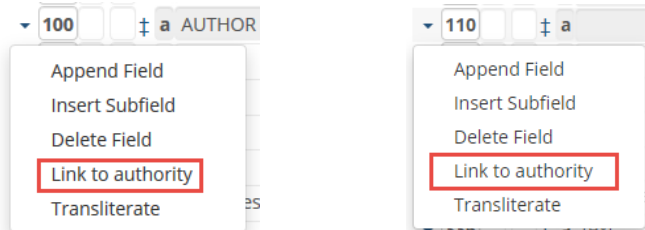
#### **110 field CORPORATE AUTHOR** *(required if applicable)*

Use these fields only if the item has an author. If the author is an individual, use the 100 field. For example, for an art reproduction, the name of the painter would go in the 100 field. Or, for a book on cassette, the 100 field would be used for the author’s name.

However, if the author is a group of people, use the 110 field (“corporate author”). For example, if you have a music cassette by a musical group, then the 110 field is used for the name of the musical group.

Instructions for searching and entering authors is as follows:

1. Click on the arrow next to the 100 field (for an individual name) and choose **Link to authority**. For a group name, click on the arrow next to the 110 field and choose **Link to authority**.



2. You will get an **Authority records Search for** pop-up box. Click in the **query terms box** and enter the author’s name in the format of **lastname, firstname for a personal name**. If you are searching for a musical group, enter the group name as is, (e.g. **rolling stones** or **they might be giants**). Note: If the musical group has “the” in the name, omit “the” from the search, e.g. search for **cure** rather than “the cure.” Click the **Search** button to run the search. See examples for an individual and corporate name below.

Authority records

Search for

PERSO\_NAME main heading atwood, margaret sorted A-Z

Search

Authority records

Search for

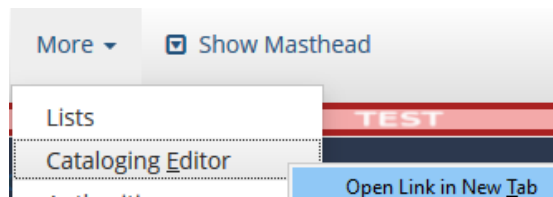
CORPO\_NAME main heading cure sorted A-Z

Search

3. The results will appear at the bottom of the screen, in alphabetical order by last name. Scroll down to the name that matches your author and click **Link Authority**. See examples for an individual and corporate name below.

Authorized Headings	Titles in catalog	Edit	Link
Atwood, Margaret, 1939- Linked from: Atwood, Margaret Eleanor, 1939- Étvud, Margaret, 1939- Atvuda, Mārgareta, 1939- Etvuda, Mārgareta, 1939- <a href="#">View/hide full record</a>	131 titles	<a href="#">Open in editor tab</a>	<a href="#">Link Authority</a>
Cure (Musical group) See also: Smith, Robert, <a href="#">View/hide full record</a>	39 titles	<a href="#">Open in editor tab</a>	<a href="#">Link Authority</a>

- The author's name will be automatically entered into the 100 or 110 field. (Note: A code will appear in the subfield 0 box. Ignore this code – do not change it. Different names will have different types of codes – this is fine). If there is no matching author, go to step 5. Otherwise, skip steps 5-11 and go to **245 field TITLE** below.
- Go to **More>Cataloging Editor>right-click** and select **Open link in new tab**.



- Under **Create a new record** click **from template**.
- The **Create a New Record** box will pop-up. Select **MARC Authority** in the first drop-down box.
- In the second drop-down box, select **Personal Name for an individual author**, or **Corporate Name for an author group**, such a musical group or corporation.

## Create new record

MARC Authority

**From template:**

- Corporate Name
- Corporate Name**
- Personal Name
- Series Title

- Click the **Create New** button.
- A blank **Personal name** or **Corporate name** template will display.



- a. For a **Personal name, use the 100 field**. Click in the “a” subfield, and enter the author’s name in the format **lastname, firstname**.
  - b. **For a Corporate name, use the 110 field**. Click in the “a” subfield, and enter the group author’s name.
11. When finished, click the **Save** button on the right side of the screen.
  12. Go back to your BSE record, and follow steps 1-4 to insert the author’s name into your BSE record.

### **245 field TITLE** *(required)*

Click in the “a” subfield, and enter the title that appears on the item, if available. If there is no title on the item, use a descriptive title in the briefest form possible. Variant titles can be entered in the **246 field ADDITIONAL TITLE**. Details and examples for entering titles is as follows:

- Capitalize only the first word of the title and any proper nouns.
- Initial articles: Enter all initial articles, regardless of language.
- Movie scripts: When entering movie scripts, follow the title with (movie script). Note: this is entered in parentheses, not brackets. Example:
  - The Young and the Restless **(movie script)**
- GMD (General Material Designation): Use GMDs to help identify the type of item. Enter the GMD by clicking in the “h” subfield of the 245. Valid GMDs for PERM materials are: [art reproduction], [game], [globe], [kit], [mobile hotspot], [picture], [seed], [toy], [electronic resource], [sound recording], and [videorecording]. GMDs are always enclosed in brackets.
- Examples:
  - ART: Use the common title of an artwork. Example: **American Gothic [art reproduction]**
  - GAMES: Use the name of the game as found on the box or other packaging. Example: **Candyland [game]**
  - TOYS: Use the common name of a toy or describe the toy as briefly as possible. Example: **Tea set [toy]**
  - KITS: Since kits are most likely assembled by the library, describe the kit as briefly as possible. Example: **Gorillas [kit]**
  - CASSETTES: All types of cassettes (including music and audiobooks) receive PERM records. All other sound recordings (such as CDs, Playaways, and Vinyl) are cataloged. For cassette records, use the title of the work. Example: **Voodoo lounge [sound recording]**
  - SEEDS: Seed packets receive PERM records for title access in LINKcat. Use the type of seed and name of the library (enclosed in parentheses) in the main title, and where present, the specific variety in the subtitle. Example: **Tomato (Oregon Seed Library) : Big boy [seed]**
  - VHS VIDEORECORDINGS: VHS tapes receive PERM records. DVDs and Blu-rays are cataloged. For VHS tapes, use the title of the work. Example: **Pink Floyd live at Pompeii [videorecording]**

- SOFTWARE THAT IS MORE THAN FIVE YEARS OLD: Any software that is more than five years old receives a PERM record. For software, use the title of the work. Example: **Mass effect 3 [electronic resource]**
- SELF-PUBLISHED MATERIALS BY LOCAL AUTHORS: Self-published materials by local authors, in all formats, receive PERM records. Use the appropriate GMD for the format (see sections V-IX for information on GMDs for each format).
- MOBILE HOTSPOTS: Mobile hotspots can receive PERM records. Use the name of the service provider, kind of network, and name of the library (enclosed in parentheses) in the title. Examples: **Verizon hotspot 5G (Adams County Library) [mobile hotspot]**, **T-Mobile hotspot 4G LTE (Waunakee Public Library) [mobile hotspot]**
- STREAMING DEVICES: Streaming devices can receive PERM records. Use the name of the device and name of the library (enclosed in parentheses) in the title. Example: **Roku Express (Spring Green Library) [streaming device]**

### **264 b PUBLISHER** *(required)*

**Name of publisher:** Click in the “b” subfield and **enter the name of the publisher**. Enter the publisher in the shortest form in which it can be understood and identified. Most PERM items will not have a publisher, and it is probably best not to make one up. If there is no known publisher, enter **[Place of publication not identified]** in the “b” subfield.

### **264 c PUBLICATION DATE** *(required)*

**Date of publication:** Click in the “c” subfield and enter the **date of publication**. If there is no date on the item at all, supply an approximate date of publication in brackets. Examples: **[1984?]** if likely published in 1984; **[199-] ?** if likely published between 1990 and 1999; or **[20--] ?** if likely published between 2000 and the present day.

### **300 a COLLATION** *(required)*

Click in the “a” subfield and enter the physical units of the item. Add, when appropriate, the number and the name(s) of the component pieces in parentheses. Examples:

- 2 jigsaw puzzles (500 pieces)
- 3 hand puppets
- 1 game (1 board, 50 cards, 2 dice)
- 1 mobile hotspot
- 1 streaming device

### **336, 337, 338 fields** *(do not change)*

Do not change any data in this field.

### **500 field NOTES** *(optional)*

Click in the “a” subfield, and enter miscellaneous information pertaining to the bibliographic record.

### **599 a FORMAT TYPE** *(required)*

Do not change the “a” subfield. By default, PERM will appear in this field.

**599 c LIBRARY** *(required)*

In the “c” subfield, labeled **branch**, click on the drop-down and choose your library from the list. You can also use the search box to search for your library.

**700 field ADDITIONAL PERSONAL AUTHOR** *(required if applicable)*

**710 field ADDITIONAL CORPORATE AUTHOR** *(required if applicable)*

Use these fields if there are additional personal or group (“corporate”) authors to be added. Follow the same instructions described in this section for the 100 and 110 fields to add these additional authors (see the above fields *100 field PERSONAL AUTHOR* and *110 field CORPORATE AUTHOR*).

**942 field** *(do not change)*

Do not change any data in the “x” subfield. This subfield tells the system that this bib is a BSE record.