

SML/BASS Policies & Processes for Media

Policies and Processes for Media

Many new policies and procedures have been developed for nonprint media: videotapes, DVDs, CD-ROMs, sound CDs, sound floppy disks (policies for microforms have not changed). The links in the navigation column on the side will bring up the general policy guidelines for handling these media formats in each area.

The overall approach is to mainstream media processing and service. Within that basic goal, libraries should aim for consistent services (such as preparation and cataloging), while maintaining the flexibility needed to meet local public service needs.

With that in mind, this Web site covers activities and standards which all libraries must maintain, but particular workflows may vary by library. The pages at this Web site are specifically for SML/BASS, and are intended for both the large departments (e.g., Cataloging and the curatorial units. Other libraries may create Web pages with specific instructions for their situation.

Protective cases and security shells for videos and CDs/DVDs will usually be purchased centrally. Please contact the Business Services Department for cases and/or shells. Each unit should do this along with the regular biannual equipment requests, so the Library can benefit from bulk purchases. Please note that orders for the security shells take a long time to arrive because the shells must be shipped from overseas.

GENERAL OVERVIEW

1. The circulation period for media titles cataloged independently and shelved in the SML or CCL stacks is one week (for all formats). Combinations like print+CD and all items at LSF circulate according to the same policies as books or serials.
2. Selectors order media materials in the same manner as they acquire other formats.
3. [Ordering](#) [1] staff place the purchase orders, applying the appropriate template in Voyager for the media format.
4. When the materials arrive, the receiving staff apply the appropriate item type: media if it's independently cataloged, circulate if it's monographic print material, or jourXX if it accompanies a serial. They place the media item inside a protective case and label either the case (for CDs and DVDs) or the cassette (for VHS and sound tapes). Monographic titles then go to selector's desk (Plaza or elsewhere); serial titles proceed directly to Cataloging.
5. Selectors make the standard decisions about shelving location (e.g., SML, CCL, LSF, LSF-R). The standard circulation period for print+media combinations is the same as a book, but in a few instances the selector may determine that the title is a nonprint item and therefore should have a one week loan period. If so, the selector inserts a grey "Media -- One Week Loan" flag in the appropriate location. If necessary for identification and access purposes, selectors may have a media item cataloged separately. Selectors then place the materials in the appropriate location according to cataloging priority (Frontlog, Priority, etc.).
6. [Catalogers](#) [2] add the appropriate item statistical category to each item's Voyager record. They determine if videorecorded in non-US format and label the case accordingly. They mark the hub of CDs and DVDs with the last nine digits of the barcode. If a "Media -- One Week Loan" flag in a multi-format title, they change the item type to media (if it has not already been done by the Acquisitions Department staff). **ONLY USE WATER-BASED PERMANENT MARKERS TO MARK CDs AND DVDs.**
7. [Preparation](#) [1] staff affix security beepers, bookplates and call number labels. Media accompanying print will have the call number, with the media type added at the end -- for example, "PN1923.2 F8 R624 2005 CD."
8. When media titles go to the stacks, circulation staff put them into hard plastic security shells and shelve them alongside the print. If an item goes to LSF, has been requested from the frontlog, or is to be sent through Eli Express, it is transported and held in a security shell.

Details and variations are explained in the process-specific pages.

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Cataloging Procedures for Audiovisual, CD-ROM, and Related Media

Overview

These guidelines are for non-print media received as stand-alone items or as material accompanying monographs or serials and should be applied to CD-ROMs, sound CDs, DVDs, VHS videocassettes, sound cassettes and floppy disks. Microforms are excluded.

Most media coming into SML Catalog and Metadata Services should arrive with a plastic case that will house the item. In the curatorial units, the staff should follow the guidelines for receiving media described on the [Acquisitions](#) [3] page before cataloging the item. The item's original case and any accompanying material (user's guides, booklets, etc.) will also be included. After cataloging, all media will be sent to Preparations along with any accompanying material that will be retained with the items. Specific types of media will require additional processing before being sent to preparations.

In addition, notify selectors if a decision by the cataloger affects an item's circulation policy (determined by the item type). For example, if it is necessary to change the format of the bibliographic record (e.g., the item arrives as a book with accompanying media, but should be cataloged as media with the book as accompanying material), or if it is necessary to create a separate bibliographic record for the media (e.g., book and media arrive as related material on one bib record, but are in fact individually issued items, and media should be cataloged separately).

Note on reference materials: Media should not go to the Starr Main Reference Room. Media accompanying print reference materials should come from Acquisitions attached to a separate MFHD with a location of **sml** and the item record should have an item type of **media**. The print portion should be on a separate MFHD with a location of **smlref** (item type in that item record should be **reference**). If accompanying media is discovered in reference materials in CMS when cataloging, separate the media and follow the above procedures and send the media portion to the stacks. Stand alone media should not be flagged for the reference collection. If stand alone media arrives in CMS flagged for the reference collection, consult your supervisor.

See the [Media Item Types and Statistical Categories](#) [4] page for the full list of item types and statistical categories.

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Audio Cassettes

These instructions are for standard analog audio cassettes with dimensions of 3 1/2 by 2 1/2 in., and a tape width of 1/2 in. They may also be called sound cassettes in the descriptive area of a bibliographic record.

Check the item record for the correct location and item type. The item type for stand-alone audio cassettes should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

Audio cassettes cataloged as accompanying material circulate with the same loan conditions as books or serials (note the exception above for [reference materials](#) [2]). If accompanying books, apply the item type **circ** and enter the item type format code (**Tape**) CHRON field of the item record.

If accompanying a serial, apply the same item type as the serial (**jour01**, **jour02**, etc.) and enter the item type format code (**Tape**) in the CHRON field. Record the item type format code in CHRON after the chronological data.

If there are multiple audio cassettes accompanying a book or serial, enter the item type format code plus a digit to distinguish each piece (**Tape 1**, **Tape 2**, etc.) in the CHRON field of the item record.

See [item record examples](#) [5] below or [Enum/Chron Fields in Voyager Item Records for Serials](#) [6].

Add an **Item Statistical Category** for all audio cassettes (stand-alone or accompanying):

- Open the item record.
- Click on the middle box (the one with the pie chart icon on it) in the lower left corner of the item record, or press Ctrl-T, to open the Item Statistical Categories dialog box.
- Choose **TAPE** from the [Statistical Categories List](#) [4] in the lower portion of the box
- Click on the blue arrow in the middle of the box to apply the Statistical Category, and click OK.
- Save the item record.

Charge to Preparations and place on the shelf prep truck

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CDs and CD-ROMs

These include computer files, interactive multimedia or sound recordings, and may be stand-alone items or material accompanying monographs or serials.

Use the appropriate marker (**USE ONLY WATER-BASED PERMANENT MARKERS**) and carefully transcribe the last 9 digits of the barcode (those after the “39002”) around the hub of the CD on the side that has the disc label. Usually you can use a black marker, but some CDs have labels that obscure the hub and will have to be marked using a different color such as silver.

Check the item record for the correct location and item type. The item type for stand-alone CD-ROMs should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

Exception for Bass Library audio books: Audio books on CD that are flagged for the Bass Library Audio Book Collection do not receive the same treatment as other sound CDs. They will arrive in CMS in their original containers, and do not need to be re-housed or marked with barcode numbers, but still require that an [item statistical category](#) [4] be applied. After cataloging, send them to Preparations as is.

NOTE: For all stand-alone CDs – computer files, interactive multimedia or sound recordings, including audio books – assign the format code (**CD**) in the MFHD as the last element of the call number. [See examples](#) [5].

NOTE: If a serial is issued in CD format, then it will get the same item type and loan conditions as a print serial (**jour01**, **jour02**, etc.). This should also be applied to older serials (those beyond the 10 year limit) or serials that may be reissued in CD format (in both cases, give them an item type of **jourcirc**). In the case of reissued serials, also assign the format code (**CD**) in the MFHD as the last element of the call number (before “(LC)”, if used), to distinguish it from the print version. [See example](#) [5].

CD-ROMs cataloged as accompanying material circulate with the same loan conditions as books or serials (note the exception above for [reference materials](#) [2]). If accompanying books, apply the item type **circ** and enter the item type format code (**CD**) in the CHRON field of the item record.

If accompanying a serial, apply the same item type as the serial (**jour01**, **jour02**, etc.) and enter the item type format code (**CD**) in the CHRON field. Record the item type format code in CHRON after the chronological data.

If there are multiple CDs accompanying a book or serial, enter the item type format code plus a digit to distinguish each piece (**CD 1**, **CD 2**, etc.) in the CHRON field of the item record.

Add an **Item Statistical Category** for all CD-ROMS (stand-alone or accompanying):

- Open the item record.
- Click on the middle box (the one with the pie chart icon on it) in the lower left corner of the item record, or press Ctrl-T, to open the Item Statistical Categories dialog box.
- Choose **CD** from the [Statistical Categories List](#) [4] in the lower portion of the box
- Click on the blue arrow in the middle of the box to apply the Statistical Category, and click OK.
- Save the item record.

Charge to Preparations and place on the shelf prep truck.

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DVDs

These include movies or digital images, or combinations of images and other types of files. DVDs may be coded for playing in specific regions of the world. The nine region codes are:

- Region 0 – All areas of the world
- Region 1 – USA , Canada and US territories
- Region 2 – Japan , Europe, South Africa and the Middle East (including Egypt)
- Region 3 – Southeast Asia and East Asia (including Hong Kong)
- Region 4 – Australia, New Zealand, Pacific Islands, Central America, Mexico, South America and the Caribbean
- Region 5 – Eastern Europe, Indian subcontinent, Africa, North Korea and Mongolia
- Region 6 – China
- Region 7 – Unused
- Region 8 – Special international venues (airplanes, cruise ships, etc.)

The region code may be in a 538 note (System requirements) in the bibliographic record or printed on the original case, and is sometimes printed on the disc itself (often as a number inside of a globe). Region 0 and 1 DVDs do not require an additional label. If the item is other than Region 0 or 1, affix a non-US format label in the lower left corner on the front of the plastic case and write the applicable region code in ink in the space provided.

Use the appropriate marker (**USE ONLY WATER-BASED PERMANENT MARKERS**) and carefully transcribe the last 9 digits of the barcode (those after the “39002”) around the hub of the DVD on the side that has the disc label. Usually you can use a black marker, but some DVDs have labels that obscure the hub and will have to be marked using a different color such as silver.

Check the item record for the correct location and item type. The item type for stand-alone DVDs should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

NOTE: For call number formatting instructions for stand-alone DVDs, see [Call Numbers for Videos \(Videocassettes, DVDs, etc.\) and Related Works](#) [7].

DVDs cataloged as accompanying material circulate with the same loan conditions as books or serials (note the exception above for [reference materials](#) [2]). If accompanying books, apply the item type **circ** and enter the item type format code (**DVD**) in the CHRON field of the item record.

If accompanying a serial, apply the same item type as the serial (**jour01**, **jour02**, etc) and enter the item type format code (**DVD**) in the CHRON field. Record the item type format code in CHRON after the chronological data.

If there are multiple DVDs accompanying a book or serial, enter the item type format code plus a digit to distinguish each piece (**DVD 1**, **DVD 2**, etc.) in the CHRON field of the item record.

See [item record examples](#) [5] or [Enum/Chron Fields in Voyager Item Records for Serials](#) [6].

Add an **Item Statistical Category** for all DVDs (stand-alone or accompanying):

- Open the item record.
- Click on the middle box (the one with the pie chart icon on it) in the lower left corner of the item record, or press Ctrl-T, to open the Item Statistical Categories dialog box.
- Choose **DVD** from the [Statistical Categories List](#) [4] in the lower portion of the box.
- Click on the blue arrow in the middle of the box to apply the Statistical Category, and click OK.
- Save the item record.

Charge to Preparations and place on the shelf prep truck.

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Floppy Disks

These include computer programs or combinations of other types of files and are not as common as they once were, but still surface, and are more likely to be accompanying material than stand-alone items.

Check the item record for the correct location and item type. The item type for stand-alone floppy disks should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

Floppy disks cataloged as accompanying material circulate with the same loan conditions as books or serials (note the exception above for [reference materials](#) [2]). If accompanying books, apply the item type **circ** and enter the item type format code (**Diskette**) in the CHRON field of the item record.

If accompanying a serial, apply the same item type as the serial (**jour01**, **jour02**, etc) and enter the item type format code (**Diskette**) in the CHRON field. Record the item type format code in CHRON after the chronological data.

If there are multiple diskettes accompanying a book or serial, enter the item type format code plus a digit to distinguish each piece (**Diskette 1**, **Diskette 2**, etc.) in the CHRON field of the item record.

See [item record examples](#) [5] or [Enum/Chron Fields in Voyager Item Records for Serials](#) [6].

Add an **Item Statistical Category** for all floppy disks (stand-alone or accompanying):

- Open the item record.
- Click on the middle box (the one with the pie chart icon on it) in the lower left corner of the item record, or press Ctrl-T, to open the Item Statistical Categories dialog box.
- Choose **DISKETTE** from the [Statistical Categories List](#) [4] in the lower portion of the box.
- Click on the blue arrow in the middle of the box to apply the Statistical Category, and click OK.
- Save the item record.

Charge to Preparations and place on the shelf prep truck.

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Item Record Field Examples

For CD-ROM accompanying monograph:

Item type: circ

Chron: CD

Item Statistical Category: CD

For CD-ROM accompanying monograph for the reference collection:

Item type for print portion: reference

Chron: <blank>

Item Statistical Category: <none>

MFHD for print portion:

8				‡b smlref ‡h
5				PC1640 ‡i .D48 20
2				

Item type for media portion: media

Chron: CD

Item Statistical Category: CD

MFHD for CD:

8				‡b sml ‡h PC1640 ‡i
5				.D48 2001?
2				

For 2 DVD set accompanying monograph:

Item type: circ

Chron: DVD 1

Item Statistical Category: DVD

Item type: circ

Chron: DVD 2

Item Statistical Category: DVD

For a Blu-ray disc accompanying monograph:

Item type: circ

Chron: BLU

Item Statistical Category: Blu-ray

For audio cassette accompanying monograph:

Item type: circ

Chron: Tape

Item Statistical Category: Tape

For CD-ROM accompanying the monthly journal Computers in libraries, v.25:no.12 (2005:Dec.):

Item type: jour05

Enum: v.25:no.12

Chron: 2005:Dec. CD

Item Statistical Category: CD

For DVD accompanying the annual Screen World, v.56 (2005):

Item type: circ

Enum: v.56

Chron: 2005 DVD

Item Statistical Category: DVD

For a 3 CD reissue of the serial The Israelite (originally issued in 1859-1867):

For disc 1:

Item type: jourcirc

Enum: _____ (blank)

Chron: 1859/1862

Item Statistical Category: CD

For disc 2:

Item type: jourcirc

Enum: _____ (blank)

Chron: 1862/1865

Item Statistical Category: CD

For disc 3:

Item type: jourcirc

Enum: _____ (blank)

Chron: 1865/1867

Item Statistical Category: CD

MFHD:

8		1b sml 1h E540.J5 1
5		187 CD (LC)
2		
8		18 0 1a 1859/1862;
6		
6		
8		18 0 1a 1862/1865;
6		
6		
8		18 0 1a 1865/1867
6		
6		

Examples for stand-alone CDs

For CD-ROM " Diccionario de historia de Venezuela ":

Item type: media

Enum: _____ (blank)

Chron: _____ (blank)

Item Statistical Category: CD

MFHD:

8				¶b sml ¶h F2321 ¶i
5				.D566 2000 CD (LC)
2				

For audio book "The world is flat" in the Bass Audio Collection:

Item type: media

Enum: _____ (blank)

Chron: _____ (blank)

Item Statistical Category: CD

MFHD:

8				¶b cclaudio ¶h
5				HM846 ¶i F74 2006
2				CD (LC)

Examples for Multiparts

For CD accompanying vol. 2 of the multipart title The history of Italian cinema:

Item type: circ

Enum: v.2

Chron: CD

Item Statistical Category: CD

For 2 DVD set of Angels in America (labeled "part 1" & "part 2" on discs):

For disc 1:

Item type: media

Enum: pt. 1

Chron: _____ (blank)

Item Statistical Category: DVD

For disc 2:

Item type: media

Enum: pt. 2

Chron: _____ (blank)

Item Statistical Category: DVD

MFHD:

8				¶b sml ¶h PN1997.2
5				¶i .A54 2004 DVD
2				
8				¶8 0 ¶a pt.1-pt.2
6				
6				

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MPMs and Multipart Media

For accompanying material associated with a specific volume of a multipart monograph (MPM), enter the specific volume number in the ENUM field of the item record for the accompanying material, and enter the item type format

code in the CHRON field. Apply the same item type as the print portion of the MPM (note the exception above for [reference materials](#) [2]).

If the accompanying material is not associated with a specific volume of the MPM, leave the ENUM field blank, and enter the item type format code in the CHRON field. Apply the same item type as the print portion of the MPM.

For multipart stand-alone media check each item record for the correct location and item type. The item type for circulating stand-alone multipart media in any format should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

NOTE: For call number formatting instructions for stand-alone multi-part VHS tapes or DVDs, see [Call Numbers for Videos \(Videocassettes, DVDs, etc.\) and Related Works](#) [7].

For multipart CDs or DVDs, use the appropriate marker (**ONLY USE WATER-BASED PERMANENT MARKERS**) and carefully transcribe the last 9 digits of the barcode (those after the "39002") around the hub of the discs on the side that has the disc label. Usually you can use a black marker, but some disks have labels that obscure the hub and will have to be marked using a different color such as silver.

Record holdings for the multipart in the 866 field of the MFHD, transcribing captions if they are associated with the enumeration (e.g., disc 1-disc 2 or pt.1-pt.2, etc.). See [Multipart MFHD Guidelines](#) [8] or [Multipart](#) [9] [Policies and Procedures](#) [9] for treatment of MFHDs.

Record enumeration in the ENUM field of the item record, transcribing captions if they are associated with the enumeration (e.g., disc 1-disc 2 or pt.1-pt.2, etc.). See [item record examples](#) [5] for multiparts or Enum/Chron Fields in Voyager Item Records for Serials.

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VHS Videocassettes

Determine the video standard. Check the item itself or refer to the 538 note (System requirements) in the bibliographic record. There are three standards for VHS videocassettes:

- NTSC (National Television Standards Committee) – the standard used in North and South America
- PAL (Phase Alternation by Line) – the standard used in much of Western Europe, Asia, throughout the Pacific and Southern Africa
- SECAM (Sequentiel Couleur A Memoire) – the standard used in France and its territories, much of Eastern Europe, the Middle East and Northern Africa

NTSC videocassettes do not require an additional label. If the item is other than NTSC, affix a "Non-US format" label in the lower left corner on the front of the plastic case and write the appropriate format in ink in the space provided.

Check the item record for the correct location and item type. The item type for stand-alone videos should be **media**. This material will circulate for one week. If there is accompanying textual material (user guides, pamphlets, inserts, etc.) that will get a separate item record, apply the item type **media** to this material as well. Enter the item type format code **Suppl** in the CHRON field for the accompanying material, and apply the Item Statistical Category **Suppl**.

NOTE: For call number formatting instructions for stand-alone VHS tapes, see [Call Numbers for Videos \(Videocassettes, DVDs, etc.\) and Related Works](#) [7].

Videos cataloged as accompanying material circulate with the same loan conditions as books or serials (note the

exception above for [reference materials](#) [2]). If accompanying books, apply the item type **circ** and enter the item type format code (**VHS**) in the CHRON field of the item record.

If accompanying a serial, apply the same item type as the serial (**jour01**, **jour02**, etc) and enter the item type format code (**VHS**) in the CHRON field. Record the item type format code in CHRON after the chronological data.

If there are multiple videos accompanying a book or serial, enter the item type format code plus a digit to distinguish each piece (**VHS 1**, **VHS 2**, etc.) in the CHRON field of the item record.

See [item record examples](#) [5] or [Enum/Chron Fields in Voyager Item Records for Serials](#) [6].

Add an **Item Statistical Category** for all videocassettes (stand-alone or accompanying):

- Open the item record.
- Click on the middle box (the one with the pie chart icon on it) in the lower left corner of the item record, or press Ctrl-T, to open the Item Statistical Categories dialog box.
- Choose **VHS** from the [Statistical Categories List](#) [4] in the lower portion of the box.
- Click on the blue arrow in the middle of the box to apply the Statistical Category, and click OK.
- Save the item record.

Charge the items to Preparations and place on the shelf prep truck.

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Item Types and Statistical Categories

In the past, media have been given a format-specific item type such as cd. Under the new system, receiving staff will apply a single generic item type (media) to all stand-alone media formats, and catalogers will add statistical categories to each item record to identify the format.

In the case of paper + media combinations, MST will apply circ to both parts by default. Catalogers may change this item type according to the exceptions noted below.

The standard Isf and Isf-r item types for books will also be used for media.

Media records that were created before the new policies were established will be changed from the old format-specific item types to the new item types. However, the Voyager circulation tables have been revised so that any media with old format-specific item types can now circulate according to the new one-week loan policies.

ITEM TYPES	
standalone media: MEDIA	One week for all reader types at SML, CCL, SSL, and Divinity.
print+media combos: CIRC for all parts (see exception below for reference materials)	All parts have the same item type. Mixed items will receive circ by default. Selectors may determine that the media part is primary (e.g., a CD-ROM has an accompanying user guide), in which case they insert a "One Week Circ" flag and catalogers will change the item type to media. If the media portion is really an independent entity, the selector may have it cataloged separately, and it will then get the media item type while the book gets circ.
serial+media combos: JOURxx for all parts	Both the paper portion and the media portion receive the usual item type for journals (e.g. jour05). If the journal volume doesn't circulate, then neither does any accompanying material, which must be used in the building with equipment that the library provides for this purpose.
special collections: nocirc	Non-circulating; nocirc may also be used for reference materials shelved in the stacks.

reference: reference	Non-circulating. Note: Some reference books have accompanying media (print+media combos). The selector may decide to split the items, often keeping the book in Reference but allowing the media to circulate (shelving it in the stacks).
STATISTICAL CATEGORIES	
Category	Usage
Beta	Seldom-used videotape format
CD	Data and software CD-ROMs, sound CDs, interactive multimedia, video CDs and mixed types
Diskette	Floppy disks of any size
DVD	Movies, digital images, data, sound, interactive media, etc.
Blu-ray	Blu-ray discs
Laserdisc	12-inch videodiscs
Phonodisc	LPs, 78s, wax discs, etc
Suppl	User guides, pamphlets, inserts, etc accompanying stand-alone media
Tape	Cassettes, reel-to-reel, computer tapes (all types except videotapes)
U-Matic	Seldom-used videotape format
VHS	Most common videotape format (includes NTSC, PAL, and SECAM)
[Other formats]	If a new or additional statistical category needs to be created, contact the head of the Cataloging Dept. Do not use an existing category unless Cataloging has set that as policy.

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Policies and Processes for Ordering Media Materials

Cataloging Module

1. Search title in Voyager for potential duplication.

- By title or by ISBN.
- If a dup is found, return request to selector with bib # information.

2. If no duplication, search OCLC for a representative bibliographic record.

- If found, XPO appropriate record into Voyager.

3. Retrieve imported record.

- Save to database and write down bib #.

4. Create MFHD.

- Add 852 field with appropriate location and "On Order."
- Save to database.

5. If no record is found in OCLC, create provisional record.

- Use appropriate template for the different media.

6. Go to Acquisitions module.

Acquisitions Module

1. Create new purchase order.
2. Fill in Header information.
3. Save.
4. Bring in line item by bib number.
5. Complete Quick line-item details box.
6. Enter any unique information concerning order in the notes field.
7. Example: CD-ROM accompanying volume.
8. Appropriate notes should be added to Header note field if it is a single-line item order.
9. If multi-line item order, add note to line-item tab box note field.
10. IMPORTANT: Imperative to also add note in requester field in the Quick Line-Item details box for Receivers. This note should read SEE NOTE. Receivers do not check any note field unless they see this message in the pop-up box.
11. Complete and approve Purchase Order.

Preparations Procedures for Processing Media for Shelving

1. Media enters Preparations in [translucent cases](#) [10]. The barcode should be attached to piece before arrival.
2. Staff member affixes security beeper to outside case, under the plastic covering, in the center of the case.
3. Staff member affixes bookplate to left inside cover, in the center of the case.
4. Staff member scans barcode on piece from labeling program, presses enter, and the call number label prints.
 - Horizontal labels are used for DVDs; therefore the format should be changed in the labeling program for this function.
 - Vertical labels are used for videos; therefore the format should be changed in the labeling program to accommodate this function.
5. Staff member affixes call number label to bottom spine, outside plastic covering.
6. Charge media to appropriate pseudo-patron for the next destination.
7. Access Services picks up media.
 - Rush Requests are delivered within SML.
 - Reference CDs go on the same truck as reference books.

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Preparing Containers and Ordering Supplies for Media

Protective Cases

There are standard protective cases for most formats, which are used for circulation, transportation between libraries, and shelving media materials at LSF.

The formats which have standard cases are:

- VHS videotapes
- CDs/DVDs
- Sound cassettes
- 3½" floppy diskettes

Other formats, such as 12" videodiscs and 5¼" floppy disks, require special cases. Send these to Preservation/Collection Care.

Examples of the CD/DVD and VHS cases in various stages of preparation are below.

CD/DVD cases		
		
DVD Step 1	DVD Step 2 (open)	DVD Step 3
		
	DVD Step 2 (closed)	
VHS Cases		



Ordering Supplies

Important: If you are expecting a large media shipment or planning a special project, make sure there are sufficient supplies before the materials arrive.

Each unit should order its **own cases** (VHS, CD/DVD, audio cassette and other formats) and security shells. They should do this at the same time they submit equipment requests. Orders go to the Business Office, which has a profile identifying the vendor, part number, and PTAE0 code for each type of supply. Payment for these materials comes from a central fund. Allow at least two months to receive the security shells, since these have to be shipped from Europe.

Marking pens should be ordered by the unit that needs them, out of its own allocation for office supplies. Only water-based permanent markers should be used to mark CDs and DVDs.

Disposal of Unacceptable Cases

Media items usually arrive in cases that don't match the type used in the Library. Most VHS and DVD cases can be recycled. Anything marked with the American or European "Recycle" symbol surrounding the number 1, 2, 4, or 5, or having the initials HDPE underneath can be recycled. Otherwise it must be thrown away. CD jewel cases cannot be recycled.

Source URL: <https://web.library.yale.edu/cataloging/smlbass-policies-processes-media>

Links

[1] <https://web.library.yale.edu/cataloging/Ordering-Media-Materials> [2] <https://web.library.yale.edu/smlbass-policies-processes-media/cataloging-media> [3] <http://www.library.yale.edu/rsc/sml/media/acq.html> [4] <https://web.library.yale.edu/cataloging/smlbass-policies-processes-media/item-types> [5] <https://web.library.yale.edu/smlbass-policies-processes-media/cataloging-media/item-record-examples> [6] <https://web.library.yale.edu/cataloging/serials/enum-chron> [7] <https://web.library.yale.edu/cataloging/video/cms-video-call-no> [8] <https://web.library.yale.edu/cataloging/multipartmfhdrev> [9] <https://web.library.yale.edu/cataloging/multipart-workflow> [10] <https://web.library.yale.edu/cataloging/containers>