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DESCRIPTIVE CATALOGING MANUAL
Procedures Applicable to Materials in Off-Site/Fixed Locations

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C8.1 BACKGROUND

Abbreviations used:

BR = bibliographic record
HR = holdings record
IR = item record
PTCP = Policy, Training, and Cooperative Programs Division
CMD = Collections Management Division

Materials are stored off-site in various facilities. The three that most directly impact cataloging are the ones at Cabin Branch, Ft. Meade, Landover. They are identified in field 852 of the HR as follows:

Cabin Branch:

852 subfield \$b (Location) contains the code "s-CB/ ..."; the "name counterpart of the code begins "s-CabinBranch ..."; subfield \$m contains "CABIN BRANCH"

Ft. Meade:

852 subfield \$b (Location) contains the code "s-FM/ ..."; the "name counterpart of the code begins "s-FtMeade ..."; subfield \$m contains "FT MEADE"

Landover:

852 subfield \$b (Location) contains the code "s-LCA/ ..."; the "name counterpart of the code begins "s-Landover ..."; subfield \$m contains "LANDOVR" (some records contain "LANDOVER"). Note: The Library is no longer adding materials to this location, though the location is valid in existing records.

Materials are also stored in Fixed Location Shelving, identified in field 852 of the HR as follows:

852 subfield \$b (Location) contains the code "c-FL ..."; the "name counterpart of the code begins "c-FixedLocation ..."; subfield \$m contains "OVERFLOW ..."

Occasionally work related to cataloging newly received materials or work related to maintenance to existing records in the LCDB involves materials stored in off-site or fixed locations. The purpose of this DCM is to provide guidance for specific situations with a view to minimizing the need either to obtain material from off-site or fixed locations or to formally withdraw material from these locations. The situations covered are as follows:

- 1) **an added copy to a single-part monograph:** a newly received copy is to be added; one or more copies are stored in off-site or fixed locations; follow standard procedure and add the copy (do not attempt to assign to the off-site or fixed location);
- 2) **a monograph has now become a serial:** one or more items cataloged as a monograph are now being recataloged as a serial; one or more issues of the serial

are stored in off-site or fixed locations; by exception, these issues will remain in the off-site or fixed location (in other circumstances duplicate issues would be withdrawn from the collections because the Library holds the requisite number of shelf copies (one set)); follow the procedures in C8.2 to make the needed adjustments to reflect this condition;

- 3) **an item, usually cataloged as MLC, is discovered to be a duplicate:** by exception, it will remain off-site (in other circumstances an MLC duplicate would be withdrawn from the collections because the Library holds the requisite number of shelf copies (one copy)); follow the procedures in C8.3 to make the needed adjustments to reflect this condition;
- 4) **a change in call number:** it is necessary to change a call number because it was incorrect when originally assigned; change the call number in the bibliographic record only; follow the procedures in C8.4 to make the needed adjustments to reflect this condition;
- 5) **multipart monographs:** a volume newly received is associated with a multipart monograph, some or all of whose volumes are stored in off-site or fixed locations; follow the procedures in C8.5;
- 6) **a change in location/custody:** a reading room or division that services materials wants custody transferred from an off-site or fixed location to that division; the material needs to be formally withdrawn from the off-site or fixed location so that the holdings and items records can be adjusted as needed to reflect the change in location; follow the procedures in C8.6;
- 7) **other situations:** consult PTCF.

Note that materials stored in off-site or fixed locations may be ordered through the standard Automated Call Slip (ACS) procedure. If they are obtained for consultation, they are returned in the standard manner as for other materials.

C8.2 MONOGRAPH BECOMES A SERIAL

This is a condition that must be dealt with by staff who catalog serials or resolve serial treatment questions in LC. In this situation, leave any issues in off-site or fixed locations. If the issue described by the monograph BR is also recorded on the HR for the serial BR, it is a duplicate, but, by exception to the general selection policy for serials of only keeping one set, it will be retained in the off-site or fixed location. In such cases an issue will be recorded both on the HR for the serial BR and also on the monograph HR, which will be relinked to the Serial BR.

If a monograph in an off-site or fixed location becomes a serial, a staff member who catalogs serials ensures a BR exists for the serial or creates one. Staff then do the following:

- 1) relink the monograph HR for the off-site or fixed location issue to the serial BR (this can be done without off-site or fixed location security);

- 2) request a staff member in CMD with off-site or fixed location security (CMDInbox@loc.gov) to do the following to the off-site or fixed location HR:
 - a) retain all existing data in the HR;
 - b) add a subfield \$3 as the first subfield in the 852 field; record in subfield \$3 the enumeration and chronology of the issue;
 - c) add to the 852 field a subfield \$x containing "Do not add any holdings to this record in an 866 field; book still marked with monograph call number. [date] [code]";

- 3) request a staff member in CMD with off-site or fixed location security (CMDInbox@loc.gov) to do the following to the off-site or fixed location IR:
 - a) change the "Item Type" to "Serial/Newspaper";
 - b) based on information in the monograph BR, add the number for the serial in the "Enum:" area and/or the date for the serial in the "Chron:" area of the IR; if the serial only has a year for the date, record it in the "Enum:" area of the IR (this makes the ACS display intelligible).

- 4) after the off-site or fixed location HR/IR are relinked to the serial BR, cancel the monograph BR and track the LCCN in 010 \$z of the serial BR; if the monograph BR has a purchase order associated with it, follow the procedures in DCM C7.3 (Bibliographic Record Retained for Audit Trail) applicable to the monograph BR. Once those steps have been followed, forward a printout of the monograph BR to the appropriate Acquisitions division as a notice that the monograph BR has been "canceled" in favor of a serial BR.

If staff who do not catalog serials in LC encounter a possible situation in which a monograph in an off-site or fixed location may be a serial, they alert staff who resolve serial treatment questions for their division or unit. If those staff judge the monograph has become a serial, they follow the procedures described above.

C8.3 DUPLICATE CATALOGING--AT LEAST ONE ITEM IN AN OFF-SITE OR FIXED LOCATION

There are duplicate bibliographic records for the same title, and at least one of the copies is in an off-site or fixed location (sometimes the off-site copy is MLC). Do the following:

- 1) determine which bibliographic record to retain; if one contains a regular call number and another an MLC shelf number, retain the former;
- 2) leave all copies in an off-site or fixed location under the existing call/shelf numbers;
- 3) relink an HR as needed to ensure all HRs are linked to the retained BR; if one or both copies are MLC, by exception, retain any that are in an off-site location (the regular retention policy for MLC items is one shelf copy);
- 4) cancel the BR not to be retained; if that BR has a purchase order associated with

it, follow the procedures in DCM C7.3 (Bibliographic Record Retained for Audit Trail) applicable to the BR;

- 5) send an e-mail to CMD (CMDInbox@loc.gov) with the subject: "Still marked"; provide in the message the LCCN of the retained BR.

C8.4 CHANGE IN CALL NUMBER

It is necessary to change a call number because the call number was incorrect when originally assigned. This process applies when one or more copies is in an off-site or fixed location. Do the following:

- 1) change the call number in the BR;
- 2) email the LCCN to CMD (CMDInbox@loc.gov) with the subject: "Still marked". CMD will add a subfield \$x to the HR with the "Still marked" information and update the call number;
- 3) if the item has been obtained from an off-site or fixed location, return it to the shelves.

C8.5 MULTIPART MONOGRAPHS

The procedures applicable to multipart monographs vary, depending upon the character of the multipart.

C8.5.1 Multipart Monograph Title Recorded In 4XX Field

This is the kind of multipart whose title is (or will be) recorded in a 4XX field.

C8.5.1.1 *Existing multipart monograph*

Process newly received volumes and added copies of volumes according to normal procedures.

C8.5.1.2 *Single part monograph becomes multipart monograph*

If the title of the now multipart will be recorded in a 4XX field, leave any volume in an off-site or fixed location under the call/shelf number assigned to the volume. Adjust the BR of the volume in the off-site or fixed location to add a bracketed 4XX to show that the volume is now part of a multipart monograph. Catalog any newly received volumes according to normal procedures.

C8.5.2 Multipart Monograph Title Recorded In 245 Field

This is the kind of multipart whose title is (or will be) recorded in a 245 field. Examine all instances of such multipart monographs (for which some or all of the volumes are in an off-site or fixed location) to see if they have a c-GenColl HR. These include:

- 1) a single part monograph that has now become a multipart monograph (a volume, usually the one that is to become volume 1, is stored at an off-site or fixed location);
- 2) added volumes, some or all of which are in an off-site or fixed location;
- 3) added copies of added volumes, some or all of which are in an off-site or fixed location.

If the resource has a c-GenColl HR:

- 1) Link the IR of the added volume to the existing HR;
- 2) Check the off-site or fixed location HR for a subfield \$3 that indicates what volumes are included in that HR;
- 3) If you have retrieved the physical volume from the off-site or fixed location, **bring the volume to the Madison Charge Station (LM G28)** for handling; or
- 4) If you have not retrieved the physical volume, or there is no subfield \$3 in the HR, email CMD (CMDInbox@loc.gov) the information about the added volume so that CMD can update the HR.

If the resource does not have a c-GenColl HR:

- 1) Ensure that the BR has been updated to reflect the added volume:
 - a. 008, 020 for the added volume, 264, 300, 505 (when present)
- 2) **Bring the volume to the Madison Charge Station (LM G28)** for handling.
 - a. CMD will add an IR for each volume and add a subfield \$3 if necessary to the HR.

C8.5.2.1

Overseas offices

For conditions covered by the initial points 1)-2) under C8.5.2 above, overseas offices are asked to:

- 1) add the temporary 955 field tracking the forwarding of an added volume;
- 2) annotate the printout inserted in the volume “off-site multipart” or “fixed location multipart”; if the BR is updated in the overseas office, also highlight the changes on the printout (usually fields 008, 020, 264, 300, 505) to alert Washington staff of the changes made;
- 3) send the volume to the Washington cataloging unit that receives other books from the overseas office;
- 4) that Washington unit deletes the temporary 955 field and incorporates the volume(s) added into the permanent 955 field; **brings the volume(s) and printout to the Madison Charge Station (LM G28)** for processing as described in C8.5.2 (after updating the BR to reflect the added volume if it has not already been done so by the overseas office).

C.8.6

WITHDRAWAL FROM AN OFF-SITE OR FIXED LOCATION

CMD limits withdrawals from an off-site or fixed location to requests from reading rooms or divisions that service materials who now wish to take custody of an item. In such cases, PTCP works with CMD to complete the withdrawal procedure. If a cataloging section receives such a request, consult PTCP.