**BLUEcloud Cataloging Checklist and Guided Notes**

**Use this Guide for the following lessons in the BLUEcloud Cataloging Training Class:**

* How to Navigate BLUEcloud
* Finding Titles and Copies
* Editing Bib Data
* Smart Search
* Adding an Item and Call Number
* Batch Modify
* Batch Creation
* Importing Bib Records
* Original Cataloging with Templates

**Fill in the blanks in the text below using words from the training site.**

**How to Navigate BLUEcloud**

Your BLUEcloud login is \_\_\_\_\_\_\_\_\_\_\_ the same as your Workflows login.

After you log in, you need to select the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ before you enter Cataloging.

The Staff menu will list the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ you have access to.

Changing your BC Central password does not change your \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ password.

**Finding Titles and Copies**

From the main cataloging screen, you can \_\_\_\_\_\_\_\_\_\_\_\_ for a title to modify bibliographic or item information, Add a New \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (original cataloging from templates), and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ a Record (currently not enabled from the main page).

If you want to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ your own title or another title in your district, choose your district’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as the target.

Facets are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ based upon the records returned in your search.

Typing \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ will auto-generate a barcode and/or call number.

**Editing Bib Data**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ data includes the fields related to the creation, modification, and display of a bibliographic record.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ data is the section where you can make changes to the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ information of a title.

You can reorder fields by using the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon.

You can delete fields with the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon.

You can click the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to the left of a field to expand the tag’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_ into individual rows.

Helps for tags, their subfields and indicators, can be found by using the \_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon.

**Smart Search**

Smart Search automatically searches \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ targets to compare records, add tags from other records, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the records or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ the existing record with a new one.

Matches between two records are highlighted in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Click the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon to display a book river with the book jackets.

When you click \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, all of the data that is in the record to the right that does not already exist in the record to the left, as an \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ match, will be added to your \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ record.

You can replace the whole bibliographic record by clicking \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Adding an Item and Call Number**

One of the following two things should be true when adding a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_: your library does not already have a call number cataloged for the item or you want to add a copy to a record with an \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ call number not currently used.

If your library already has a call number created for a record, you may need to only \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ an item.

Enter \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as the initial call number to prevent system errors regarding duplication.

Using \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ call number will shadow the call number and any associated items from the online catalog.

When adding an item, the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ selected will determine the owning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Batch Modify**

The Batch Modify option allows you to edit \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ items in batch.

Use the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon to open the Batch Modify screen.

A few fields that can be modified include \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ type, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, etc...

Click \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ to undo changes that were made.

**Batch Creation**

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ option allows you to create multiple items in batch from the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Holdings List view.

Click the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ icon to open the Batch Create screen.

Item Details are \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ from the record selected to the new items being created.

A \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ checkmark indicates success in creation of items.

**Importing Bib Records**

Matched records from sources like OCLC and Library of Congress are referred to as the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ record.

Select a specific target to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ your search and locate a record for importing.

A record must match your item’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ description.

If you would like to add items to your newly imported record, click \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Original Cataloging with Templates**

One place you can find the +New Record link is on the Cataloging \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Clicking the Staff Only box allows only \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ staff to view the record.

When making changes to a bibliographic record, click \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ often.

If you would like to add items to the record, use \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ over a tag or its subfield to see a description of that field.

The Helper icon will link you to the \_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (subscription based) or the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (free) for more information about a field.