

Maine Balsam Library Consortium

Cataloging Directions

Table of Contents - click on a topic to jump directly to that section:

[1.1 Item Cataloging](#)

[1.2 Copy Cataloging \(Z39.50\)](#)

[1.3 Delete A Single Item](#)

[1.4 Delete Items in a Batch Using Barcodes or Item Numbers](#)

[1.5 Add/Delete Item Cover Images](#)

[1.6 Move Item from One Record to Another Record](#)

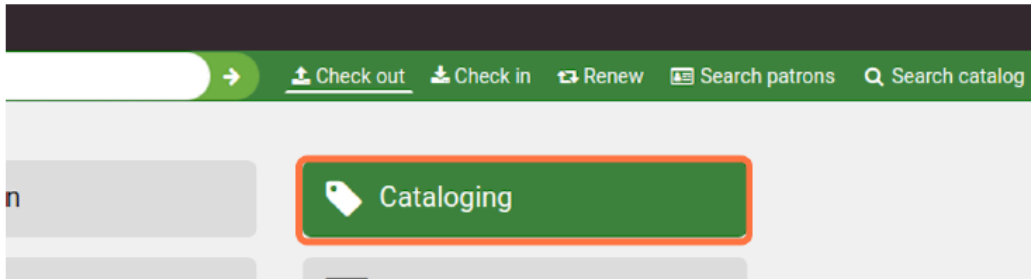
[1.7 Merging Records](#)

1.1 Item Cataloging

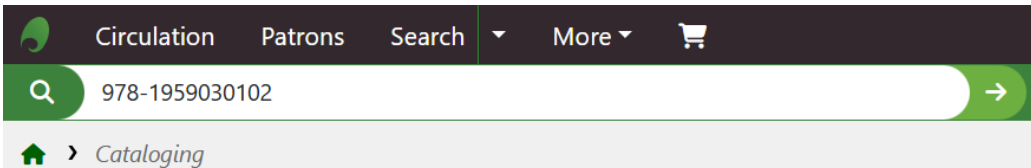
Adding an item to an existing record in the Balsam catalog.

Step 1: Go to <https://staff-balsam.bywatersolutions.com/> and enter your login credentials. The homepage defaults to check out.

Step 2: Click 'Cataloging'



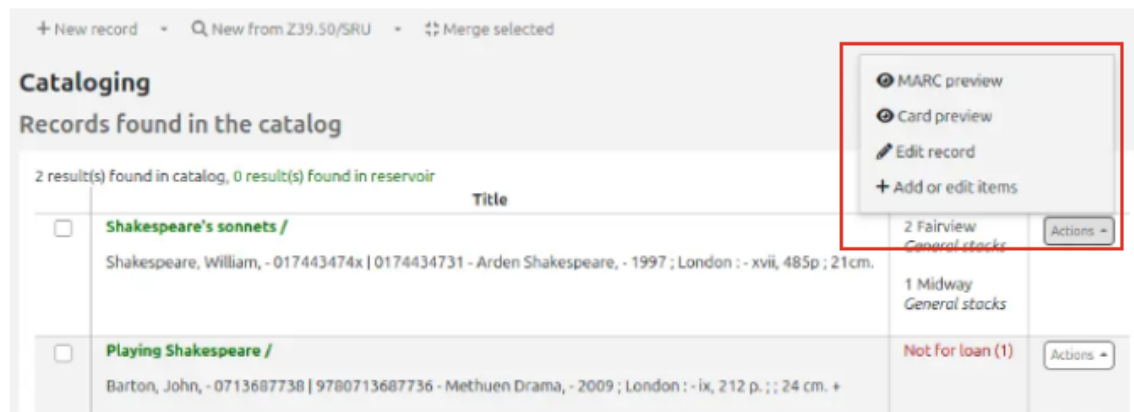
Step 3: Type in search terms like ISBN (978-1959030102) or Title (move like water).



Step 4: Click the search button.



Step 5: If there are results, click on 'Actions' and select 'MARC preview' or 'Card preview'. This will cause a pop-up window to appear so you can see the record and make sure it matches your item in hand.



MARC preview ✕

```

LDR 04119cas a2200961 4500
001 11224987
005 20220114065653.0
008 750720c19709999enk x 0 a0eng c
010 _a 79088675
016 _a(AMICUS)000000201159
016 7 _a0241522
      _2DNLM
016 7 _aA14325000
      _2DNLM
022 0 _a0065-2830
      _l0065-2830
      _22
030 _zAVLSA
035 _a(OCOLC)ocm01461209
040 _aMUL
      _beng
      _cMUL
      _dSUL
      _dNSD
      _dDLC
      dSER
  
```

Card preview ✕

Advances in librarianship.
 New York, Academic Press, 1970- <2008-> Bingley, UK, Emerald

volumes 24 cm

Editor: v. 1-<, 5> M.J. Voigt.

Some volumes have also individual theme titles.

Vol. 41 (2016).

SERBIB/SERLOC merged record

1.Library science--Periodicals.2.Library Science3.Library Surveys4.Bibliothéconomié--Périodiques.5.Bibliothéconomié.6.Annuaires.7.Library science.--(OCOLC)fst009979168.Bibliothéekwezen.9.Library science--Periodicals.i.Library science#24987LCCN: 790-88675020/.5

Step 6: When done evaluating the record, click on the X to close the pop-up window.

Step 7: Once you have determined the record is the one you want, click on 'Actions' again and select '+Add or edit items'.

MARC preview
 Card preview
 Edit record
 + Add or edit items

Atlantic QH 91.3 .S76 2023

Actions ▾

Step 8: The item form will show next. There are a number of required fields:

1. A - home library (autofilled)
2. B- current library (autofilled)
3. C - shelving location
4. O - full call number
5. P - barcode
6. Y - Koha item type - This is pre-filled with the Koha Item Type selected by the cataloger who originally imported/created the record. BUT - this can be changed - each library defines its own items. Meaning, when you see search results for a title held by multiple libraries, the Item Type column can be Book for one library and New material for another.

The only important, but not required field is:

1. V - cost, replacement price - if left blank, a default price of \$15 will be automatically added for overdue and billing purposes

0 - Withdrawn status	<input type="text"/>	
1 - Lost status	<input type="text"/>	
2 - Source of classification or shelving scheme	<input type="text" value="Dewey Decimal Classification"/>	
3 - Materials specified (bound volume or other part)	<input type="text"/>	
4 - Damaged status	<input type="text"/>	
5 - Use restrictions	<input type="text"/>	
7 - Not for loan	<input type="text"/>	
8 - Collection code	<input type="text"/>	
a - Home library	<input type="text" value="Thorndike Library College of the Atlantic"/>	Required
b - Current library	<input type="text" value="Thorndike Library College of the Atlantic"/>	Required
c - Shelving location	<input type="text"/>	Required
d - Date acquired	<input type="text" value="09/02/2025"/>	X
e - Source of acquisition	<input type="text"/>	
g - Cost, normal purchase price	<input type="text"/>	
h - Serial Enumeration / chronology	<input type="text"/>	
o - Full call number	<input type="text" value="TERM KIM c.1"/>	Required
p - Barcode	<input type="text" value="35105001166863"/>	Required
t - Copy number	<input type="text"/>	
u - Uniform Resource Identifier	<input type="text"/>	
v - Cost, replacement price	<input type="text"/>	Important
w - Price effective from	<input type="text" value="09/02/2025"/>	X
x - Non-public note	<input type="text"/>	
y - Koha item type	<input type="text" value="Book"/>	Required
z - Public note	<input type="text"/>	

Step 9: Click on Add item to finish

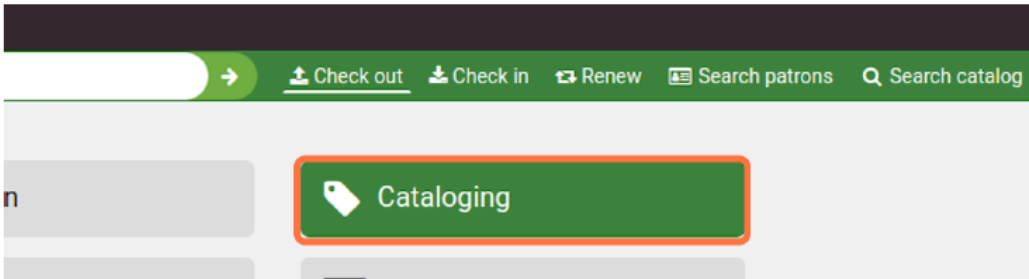
Note that you should view the item in both the OPAC and staff staff to check your work and make sure the record/item is all good.

1.2 Copy Cataloging (Z39.50)

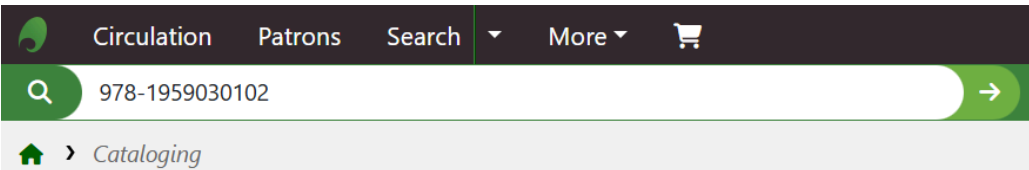
Importing a record using Z39.50, also called copy cataloging.

Step 1: Go to <https://staff-balsam.bywatersolutions.com/> and enter your login credentials. The homepage defaults to check out.

Step 2: Click 'Cataloging'



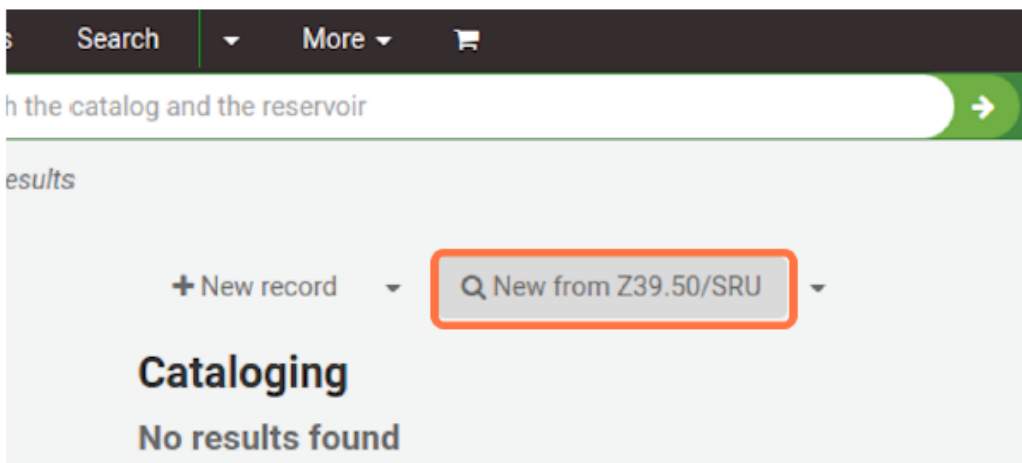
Step 3: Type in search terms like ISBN (978-1959030102) or Title (move like water).



Step 4: Click the search button.



Step 5: If there are no results, click on 'New from Z39.50/SRU'



Step 6: The search form will autofill with the ISBN or search query. Fill in additional fields as needed. Mainecat & Prospector are autochecked, but you can uncheck or check any of the search targets you prefer. Click on Search.

Z39.50/SRU search

ISBN:

ISSN:

Title:

Author:

Publication year:

Subject heading:

Keyword (any):

LC call number:

Control no.:

Dewey:

Standard ID:

Search targets

Select all | Clear all

LIBRARY OF CONGRESS

MAINECAT

MILWAUKEE COUNTY FEDERATED LIBRARY SYSTEM

PROSPECTOR (COLORADO)

SAN FRANCISCO PUBLIC LIBRARY

TULSA PL

Step 7: Evaluate the search results by clicking on 'MARC' and select 'MARC preview' or 'Card preview'. This will cause a pop-up window to appear so you can see the record and make sure it matches your item in hand.

ISBN	LCCN	Actions
020198817:	92002605	MARC

MARC preview [X]

```
LDR 04119cas a2200961 4500
001 11224987
005 20220114065653.0
008 750720c19709999enk x 0 a0eng c
010 _a 79088675
016 _a(AMICUS)000000201159
016 7 _a0241522
      _2DNLM
016 7 _aA14325000
      _2DNLM
022 0 _a0065-2830
      _l0065-2830
      _22
030 _zAVLSA
035 _a(OCoLC)ocm01461209
040 _aMUL
      _beng
      _cMUL
      _dSUL
      _dNSD
      _dDLC
      _dSER
```

Card preview [X]

Advances in librarianship.
New York, Academic Press, 1970- <2008-> Bingley, UK, Emerald

volumes 24 cm

Editor: v. 1-<, 5> M.J. Voigt.

Some volumes have also individual theme titles.

Vol. 41 (2016).

SERBIB/SERLOC merged record

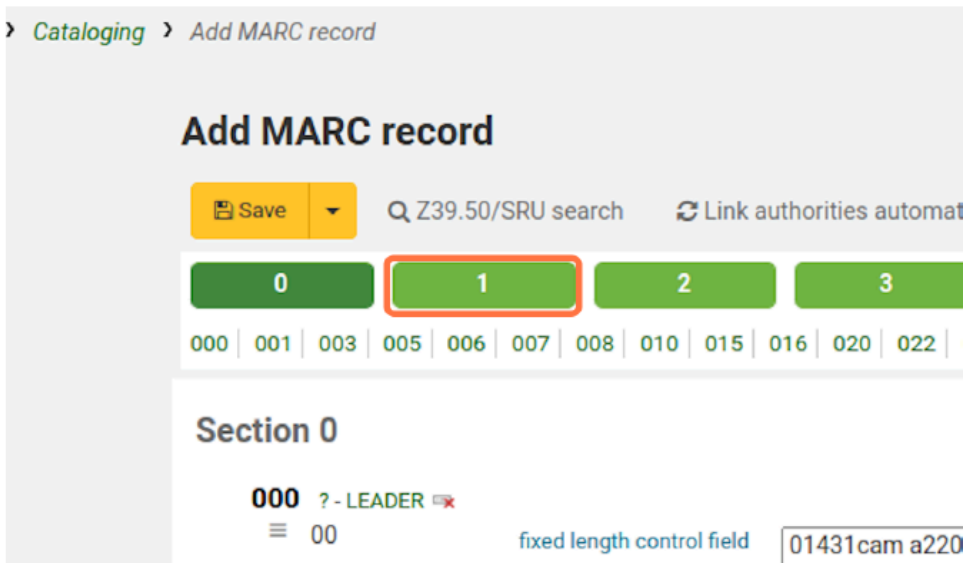
1.Library science--Periodicals.2.Library Science3.Library Surveys4.Biblioth conomie--P riodiques.5.Biblioth conomie.6.Annuaires.7.Library science.--(OCoLC)fst009979168.Biblioth kwezen.9.Library science--Periodicals.i.Library science#24987LCCN: 790-88675020/.5

Step 8: When done evaluating the record, click on the X to close the pop-up window.

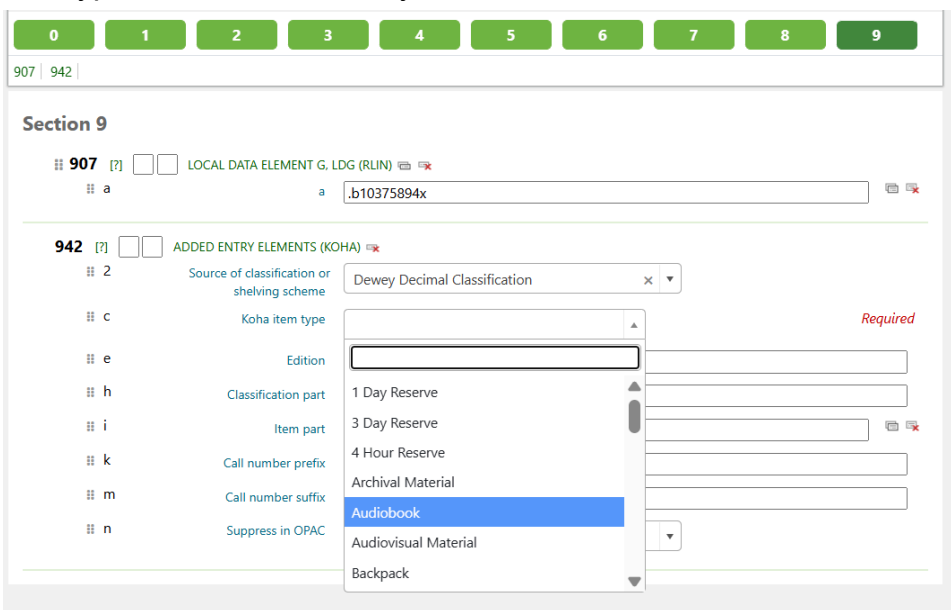
Step 9: Click on the arrow and click 'Import'



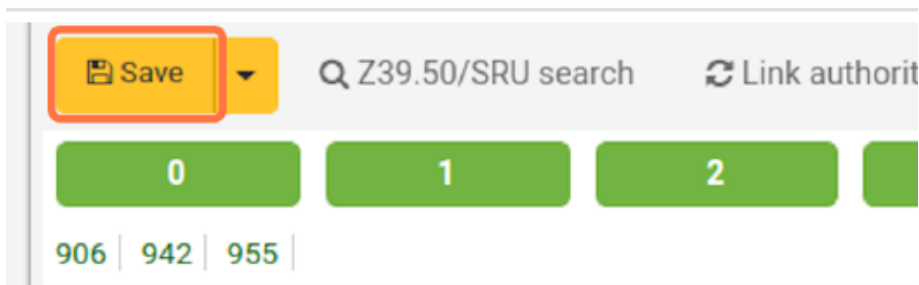
Step 10: Navigate through the tabs to check the record and edit fields as needed. For example, click on 1 to evaluate the author/contributor fields. Continue as needed to the 9 tab.



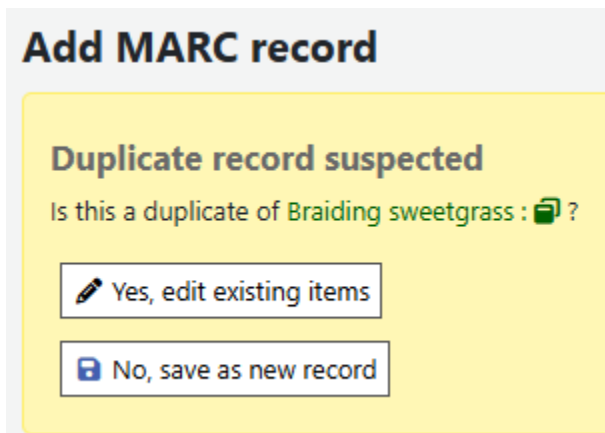
Step 11: In the 9 tab, navigate to the 942 c Koha item type field. Click on the dropdown and select the item type that best matches your item in hand.



Step 12: Click on 'Save'.



*If the record matches an existing record in Balsam, you will get this alert:



You can click the green title to view the record and decide whether or not you need to import a new record.

Step 15: The item form will show next. There are a number of required fields:

1. A - home library (autofilled)
2. B- current library (autofilled)
3. C - shelving location
4. O - full call number
5. P - barcode
6. Y - Koha item type - This is pre-filled with the Koha Item Type selected in Step 11. Just note, that even though it might be a Book item type in the record, here in the item form you can select whatever is appropriate for your library's item. For example, it might be a Book that is considered New Material, so when adding the item, choose New Material, then change back to Book once it has aged out of the New Material status.

The only important, but not required field is:

1. V - cost, replacement price - if left blank, a default price of \$15 will be automatically added for overdue and billing purposes

0 - Withdrawn status

1 - Lost status

2 - Source of classification or shelving scheme x ▼

3 - Materials specified (bound volume or other part)

4 - Damaged status

5 - Use restrictions

7 - Not for loan

8 - Collection code

a - Home library x ▼ Required

b - Current library x ▼ Required

c - Shelving location Required

d - Date acquired ✗

e - Source of acquisition

g - Cost, normal purchase price

h - Serial Enumeration / chronology

o - Full call number Required

p - Barcode Required

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price Important

w - Price effective from ✗

x - Non-public note

y - Koha item type x ▼ Required

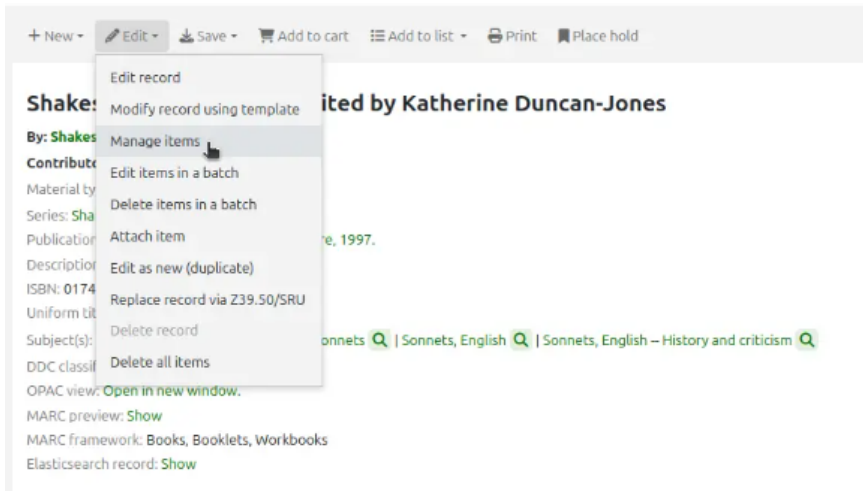
z - Public note

Step 16: Click on Add item to finish

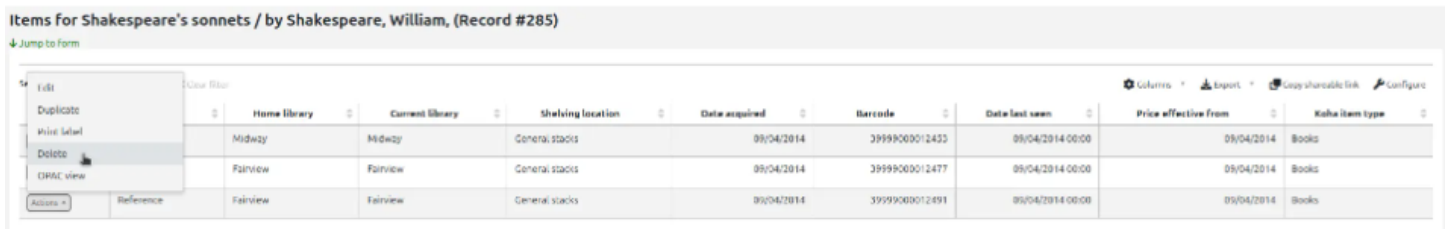
Add item

1.3 Delete A Single Item

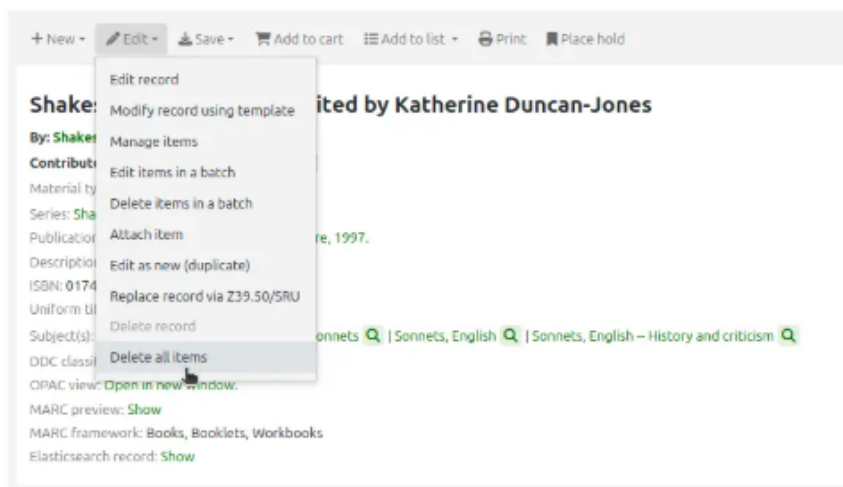
Step 1: Go to the record's details page, click the 'Edit' button at the top and choose 'Manage items'.



Step 2: Click the 'Actions' button next to the item to delete, and choose the 'Delete' option. If the item is not checked out, it will be deleted.

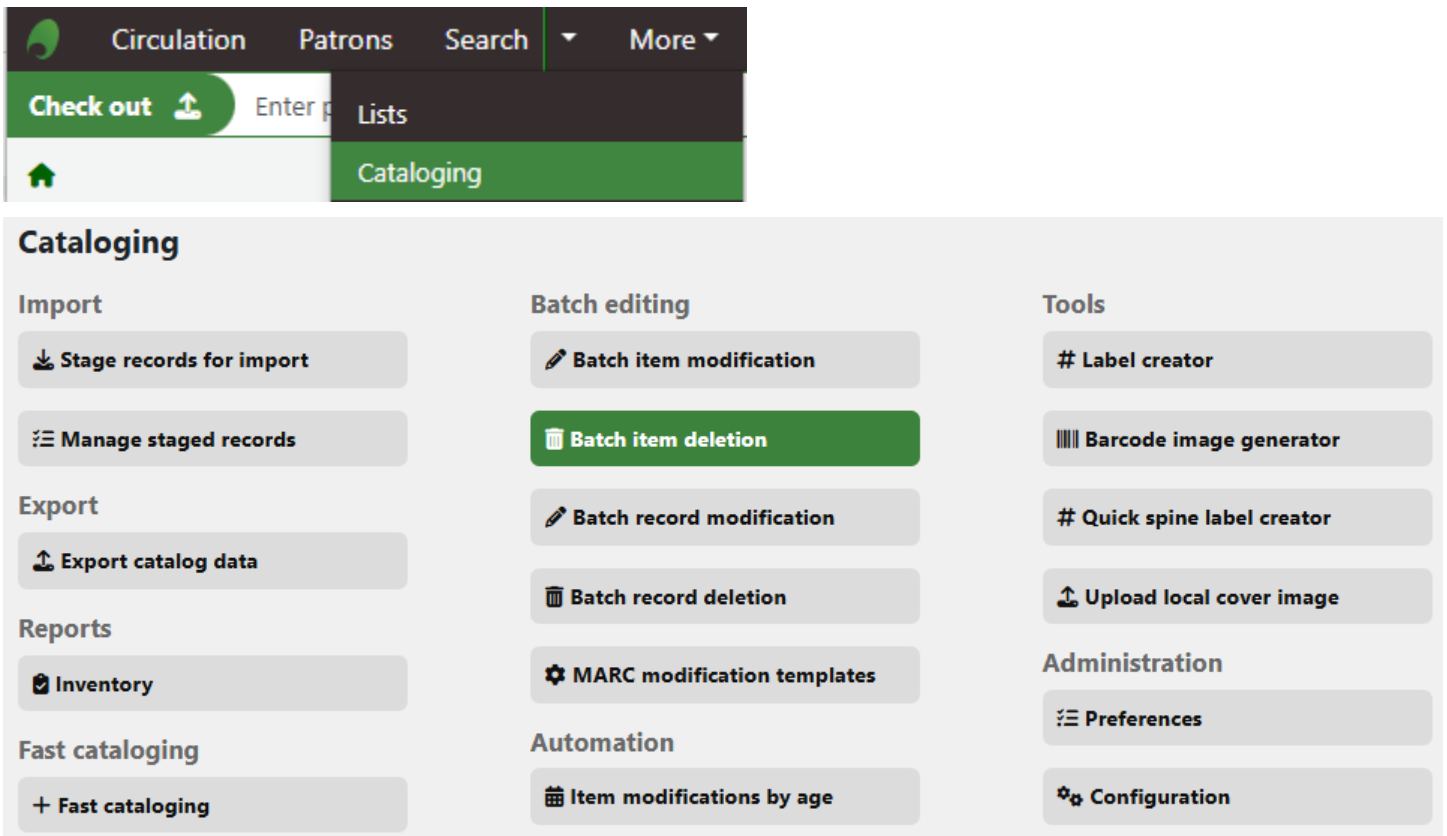


Step 3: If all the items attached to the record are not currently checked out, from the record's details page, click the 'Edit' button at the top and choose 'Delete all items'. This will delete all the items from the record.



1.4 Delete Items in a Batch Using Barcodes or Item Numbers

Step 1: More > Cataloging > Batch editing > Batch item deletion



Step 2: From the tool, choose to either upload a file of barcodes or item numbers, or scan item barcodes one by one into the box below the upload tool.

Batch item deletion

Use a file

Barcode file:

Item number file:

File: No file selected.

Or scan items one by one

Barcode list (one barcode per line):

Step 3: Once the file is uploaded or the barcodes listed, click 'Continue.'

You will be presented with a confirmation screen. From here you can uncheck the items you don't want to delete. You can check the 'Delete records if no items remain' box to delete the bibliographic record if the last item is being deleted.

	Title	Holds	Withdrawn status	Home library	Current library	Date acquired	Total Checkouts	Barcode	Date last seen	Price effective from	Koha item type
<input checked="" type="checkbox"/>	Shakespeare's Sonnets , by Shakespeare, William,	0	Withdrawn	Centerville	Centerville	07/04/2022	0	000041	07/27/2022	07/04/2022	Ebook
<input type="checkbox"/>	The Third Part of King Henry the Sixth , by Shakespeare, William,	0/1	Withdrawn	Centerville	Centerville	07/04/2022	0	000099	07/04/2022	07/04/2022	Ebook
<input checked="" type="checkbox"/>	The Two Gentlemen of Verona , by Shakespeare, William,	0	Withdrawn	Centerville	Centerville	07/04/2022	0	000105	07/04/2022	07/04/2022	Ebook
<input checked="" type="checkbox"/>	King Richard the Second , by Shakespeare, William,	0	Withdrawn	Centerville	Centerville	07/04/2022	0	000108	07/04/2022	07/04/2022	Ebook
<input checked="" type="checkbox"/>	A Midsummer Night's Dream , by Shakespeare, William,	0	Withdrawn	Centerville	Centerville	07/04/2022	0	000110	07/04/2022	07/04/2022	Ebook

Note: Items that are the last item attached to a bibliographic record with one or more record-level holds will be automatically unchecked. You will need to delete the hold before deleting the item.

Items that are checked out will also be automatically unchecked. They will need to be checked in before they can be deleted.

Step 4: Click 'Delete selected items.' The deletion job will be enqueued in the background jobs.

Batch item deletion

Too many items (1150) to display individually.

This will delete all the items.

Delete records if no items remain. [Delete ALL submitted items](#) [Cancel](#)

If your file (or list of scanned barcodes) has more than 1000 barcodes, Koha will be unable to present you with a list of the items. You will still be able to delete them, but not able to choose which items specifically to delete or delete the bibliographic records.

Step 5: To see the deletion details, click 'View detail of the enqueued job'.

Batch item deletion

The job has been enqueued! It will be processed as soon as possible.

[View detail of the enqueued job | New batch item deletion](#)

[Return to batch item deletion](#)

1.5 Add/Delete Item Cover Images

You can upload (and delete) cover images for individual item records.

To Add Cover Images

Step 1: Click the Edit button on the right of the Holdings table and click 'Upload image'

Last seen	Date accessioned	Date last borrowed	Barcode	Spine label	
12/12/2019	15/03/2018	19/03/2018	7678690		
11/01/2021	15/03/2018	19/03/2018	3467463		

Step 2: Click Choose file to find the image file on your computer and then Upload file. On the next screen you are given the option to replace existing images. You can then click on Process images. The image will display in a Cover image column in the holdings display.

Holdings (2) | Descriptions (2) | Acquisition details | Images (0)

Activate filters | Select all | Clear all

Showing 1 to 2 of 2 entries | Search: | Clear filter | Columns | Export

Cover image	Item type	Current library	Home library	Class number
<input type="checkbox"/>	Book	Education Library	Main Library New Materials Shelf (Shelving Trolley)	641.8553
<input type="checkbox"/>	Book	Education Library	Main Library General Shelves (Shelving Trolley)	641.8553

Showing 1 to 2 of 2 entries

To Delete Cover Images

To delete an image, click on the image in the holdings display. You will see a grayed out copy of the image with the option to delete.

+ New | Edit | Save | Add to | Print | Place reservation

Images for *Seasonal baking* : Cairns, Fiona.

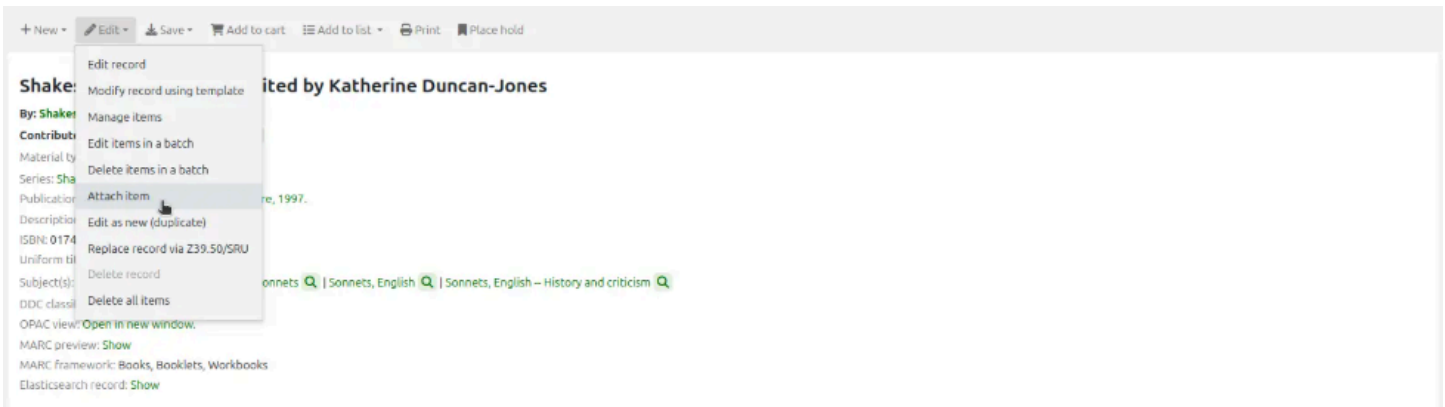


Upload an image file:

1.6 Move Item from One Record to Another Record

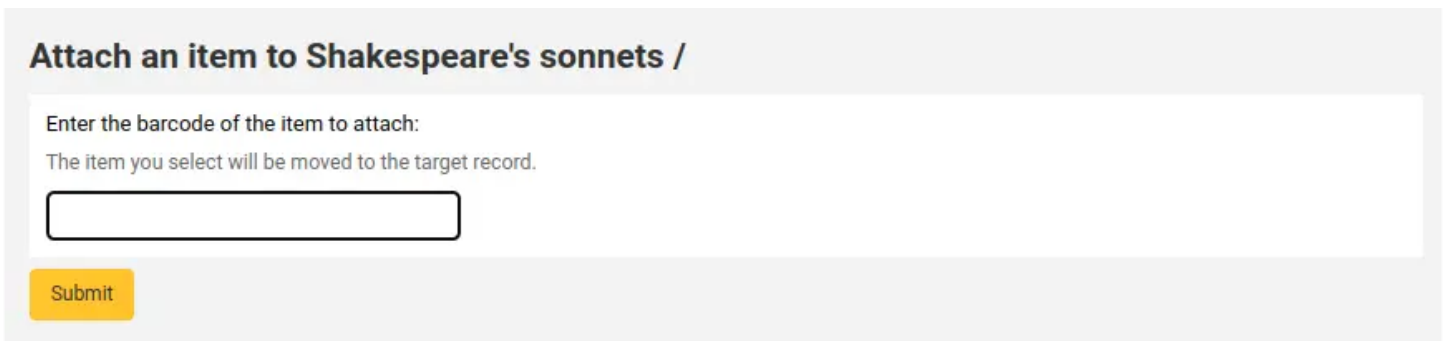
Items can be moved from one bibliographic record to another using the 'Attach item' option.

Step 1: Visit the bibliographic record you want to attach the item to and choose 'Attach item' from the 'Edit' menu.

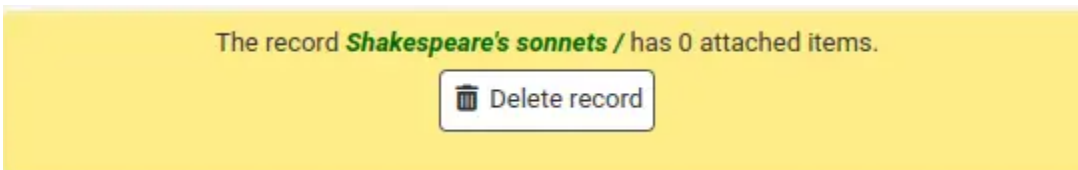


Step 2: Simply enter the barcode for the item you want to move and click 'Submit'.

If this is the last remaining item attached to a bibliographic record you will be presented with a button to delete the original host record.



Step 3: If you want to move all items to a new record creating only one bibliographic record you can use the [merge records tool](#) instead.

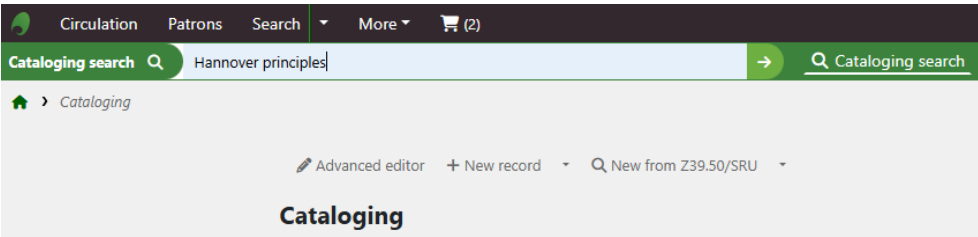


1.7 Merging Records

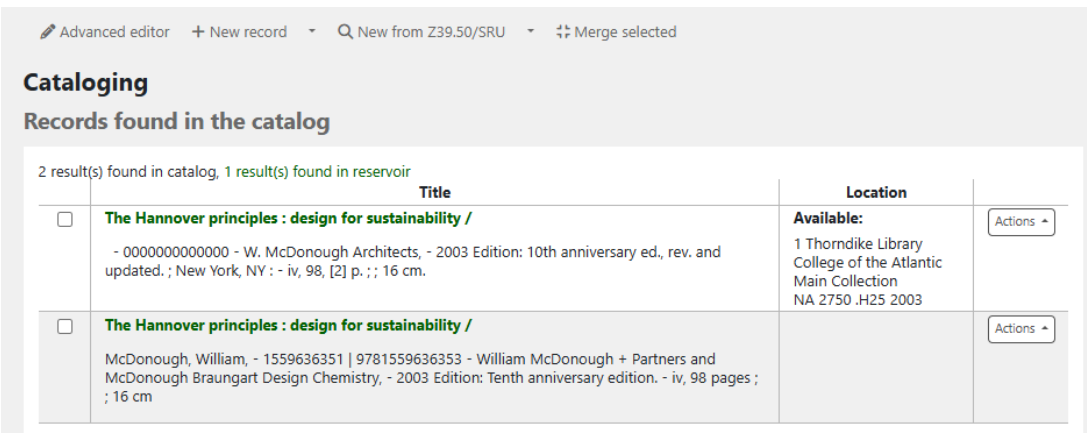
Step 1: Go to Koha homepage and click on 'Cataloging'



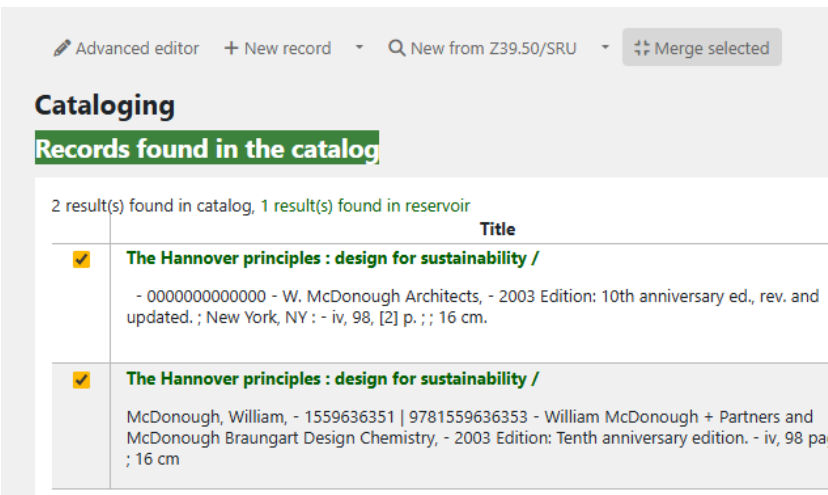
Step 2: Search for the title of the item with multiple records



Step 3: You should see the record already in Balsam and the record without any items that you just imported.



Step 4: Select the boxes next to the records to be merged and click 'Merge Selected'



Step 5: Click the circle next to the record to be kept and click 'Next'. If you're not sure which record is which, you can search the record number in (xxxxxxx) in Balsam.

Merging records

Please choose which record will be the reference for the merge. The record chosen as reference will be kept, and the

Merge reference

- The Hannover principles : design for sustainability / (261818) View MARC
- The Hannover principles : design for sustainability / (460958) View MARC

Using framework:

Next

Step 6: The new record will have all fields checked to add in the final (destination) record. You can uncheck the fields you don't want in the final (destination) record from each source records. To toggle between the records, click on the green tab with the record number.

Merging records

Source records

1064 (ref)

1146

- 000 / 00568cam a22001693a 4500
- 001 / 1966
- 003 / PGUSA
- 005 / 20220704101634.0
- 008 / 991101s1999|||||xxu|||||s|||||000 1 eng d
- 040
- a / PGUSA
- b / eng

Destination record

- 000 / 00568cam a22001693a 4500
- 001 / 1966
- 003 / PGUSA
- 005 / 20220704101634.0
- 008 / 991101s1999|||||xxu|||||s|||||000 1 eng d
- 040
 - a / PGUSA
 - b / eng
- 042
- a / PGUSA

Step 7: Scroll to bottom of the page and click 'Merge'

Merge

Fields to display in report: (Example: "001,245ab,600")

Once merged, you'll see a screen like this:

Merging records

The merge was successful. [View the merged record.](#)

Report

Biblionenumber

460958 (record kept)

261818

Merging records

The merge was successful. [View the merged record.](#)

Step 8: Click on 'View the merged record' to go to the record