

Courtney Fenters. Evaluation of a Training Method for Library Cataloguing Volunteers. A Master's paper for the M.S. in L.S. degree. April, 2015. 46 pages. Advisor: Ericka Patillo

This paper describes a project conducted in conjunction with the library at the LGBT Center of Raleigh. Five volunteers were instructed to create catalog records for the same ten books, following only the instructions in a set of procedures called the cataloguing manual. Their work was then briefly discussed. The effectiveness of the manual was evaluated by comparing the participants' records with librarian-created "perfect" records for the same books. Participants' qualitative feedback was then incorporated into the final draft of the manual.

Headings:

Catalogers -- Training of

Cataloging -- Analytical entry

Documentation -- Evaluation

Library volunteers

EVALUATION OF A TRAINING METHOD FOR LIBRARY CATALOGUING
VOLUNTEERS

by
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Introduction

Libraries of all types are dependent on funds from a parent institution or the government. In times of economic recession, these funds are often reduced or cut off entirely. Since the advent of resources accessible online 24/7 and the proliferation of new technology, it has fallen to libraries to prove their own worth even in times of economic growth. If they are to continue to exist successfully, libraries must find creative solutions to stretch each dollar they receive.

There are many money-saving strategies that libraries can employ. A common strategy is to utilize volunteers to complete daily library tasks. Libraries usually have no shortage of volunteers; retired adults, community members, and students often think of the library first when they are looking to give back to their communities. Volunteers can complete tasks that would ordinarily consume the time of a paid employee, leaving the paid employee to do other things and thus saving money for the library. Volunteers are usually only a supplement to paid library employees and are often given the time-consuming, tedious tasks that are necessary but not particularly desirable. These tasks tend to require little skill, and thus very little training, so having volunteers complete these tasks can be cost-effective overall for the library. The assignment of tasks is, however, left to the discretion of each librarian; volunteers may have strengths in one area that allow them to work on more complex tasks.

One of the consequences of utilizing volunteers is the quality of work produced. Depending on the volunteer, a lack of investment in their work, a lack of attention, a lack

of knowledge and training, or a lower skill level might negatively impact quality. If the quality of work is low, the librarian has to decide whether that level is acceptable or if someone else needs to re-do the work. Either way, the library suffers. Each library must find balance between ensuring the quality of volunteer work without sacrificing unnecessary resources.

Through the project described in this paper, the researcher attempted to address the gap in volunteer training at one particular library. The proposed solution was a written set of cataloguing procedures, designed to supplement initial in-person training and to replace later in-person interactions whenever possible. If this cataloguing manual provides clear and effective instructions that volunteers are willing to follow, the librarian can spend less time “hand-holding” and fixing errors. The researcher evaluated the effectiveness of the cataloguing manual in training library volunteers.

Literature Review

Utilizing volunteers as a response to budget cuts

It can hardly be contested that libraries have been hit hard by the economic recession in the United States. The recession has affected all types of libraries, from public to academic (McKendrick, 2013). It has been established in the library science literature that the utilization of volunteers can be one money-saving strategy for libraries with limited funds. The 2013 Library Resource Guide Benchmark Study revealed the impact of the economic recession on 796 libraries throughout the United States and Canada. In 2011, 18% of the libraries surveyed “added volunteers” in response to budget cuts (McKendrick, 2013).

Margaret Forrest, the Academic Liaison Librarian at the University of Edinburgh, discusses many roles that student volunteers can fill within the academic library system. She mentions shelving, photocopying, scanning, working at the front desk, “collection management tasks,” creating voice recordings of books for students with disabilities, cleaning, entering data, and cataloguing (Forrest, 2012). Kevin Leonard, the University Archivist at Northwestern University, discusses how volunteers can be of use in archives. He emphasizes the importance of considering each volunteer’s strengths and experiences, as well as their motivations for volunteering, in assigning tasks. For example, retirees who plan to volunteer for a longer period of time would be more suitable for reference work than students who seek to diversify their experience and plan to stay for only a semester. On the other hand, if a volunteer had particular “language fluency or useful technological proficiency,” it would be wise to utilize these skills when possible (Leonard, 2012). Nuria Lloret Romero, an information professional at the Universidad Politécnica de Valencia in Spain, mentions that libraries may need to rely on volunteers as a supplement to paid employees in order “to continue offering services to groups which are excluded and at risk of exclusion” (Romero, 2011).

Disadvantages of utilizing volunteers

Is the utilization of volunteers an *effective* money-saving strategy? Nicol and Johnson (2008) provide a fairly comprehensive overview of disadvantages that come with relying on volunteers. Paid library employees may feel threatened by volunteers, whose free labor may tempt administrators to cut paid positions. This perception of volunteers as a threat could lead to resentment, among other consequences. There are also ethical questions associated with the utilization of volunteers. Who would be liable if a

volunteer were injured while working at the library? In some libraries, volunteer positions can lead to paid positions, but doesn't this practice intrinsically exclude people who cannot afford to work for free in the first place? Is it okay for volunteers to have access to patrons' personal information (such as circulation records or reference queries) with no ethical training? And of course, volunteers can be unreliable because they have no obligation beyond their own personal commitment to work hard, be on time, accept tasks, or learn new skills. Nicol and Johnson (2008) also mention the potential for negative publicity that comes with volunteers, particularly if they feel they are treated unfairly.

Finally, there is the issue of quality of work. Libraries may underestimate the investment required to produce volunteers whose work is of the same quality as paid employees. Training, supervision, and recognition all take time and money from other library tasks (Nicol & Johnson, 2008). This does not mean that volunteers are inherently less skilled, less intelligent, or less able than paid employees, but there are a plethora of factors that might lead to a decrease in quality. First, since volunteers are providing a free service to the library, they face few consequences for completing subpar work. They can be "fired," so to speak, from their positions, but there are many reasons that this does not always happen. Libraries in dire straits may be reluctant to turn down free labor and will try very hard to assign tasks that a volunteer is able to complete satisfactorily. Library employees, not wanting to discourage well-meaning volunteers, may prefer to humor them rather than to confront them about their work. Second, it is important to remember that people choose to volunteer for any number of reasons. Students, in particular, may be required to obtain a minimum number of volunteer hours. Volunteers who are merely

meeting a requirement may be less inclined to complete tasks to the best of their abilities. Third, volunteers often lack the training that paid employees have, and libraries may not be able to provide thorough on-the-job training for volunteers - after all, the point of utilizing volunteers is *free* labor.

Training volunteers

So, how can libraries get the most from our volunteers? A common solution is to assign volunteers only the simplest tasks, which circumvents the need for training. Larger libraries may be able to afford to relegate only these tasks to volunteers, but in small libraries which rely on volunteers to function, it is often impossible not to rely on volunteers for more complex tasks. For these situations, we need a new framework for working with volunteers. One aspect of this is training. If we expect volunteers to complete more complex tasks in a satisfactory manner, we must offer them training as we would offer paid employees training. The question, then, is how much libraries can afford to invest in temporary, part-time workers who have no obligation to the library. It is important that our training processes be as efficient as possible so as to maximize resources.

Methods

Background and needs

The library at the LGBT Center of Raleigh was founded in 2011. It has a collection of over 3,000 books, DVDs, and CDs, all of which support the information needs of the Center and the LGBT community. The collection is built almost entirely from donations and is growing rapidly. The library has been run since its establishment by a single part-time librarian, although several other information professionals

contribute on a volunteer basis by sitting on the steering committee and organizing library programs.

The library employs volunteers for most functions, including circulation, upkeep, library programming, and cataloguing. The cataloguing is completed using ResourceMate, a program that imports records when possible from other sources but often requires editing to enter library-specific information and for consistency. The cataloguing has little to do with traditional MARC records; instead, it functions more like data entry. Due to the backlog of and demand for materials needing to be catalogued and processed at this particular library, it is more important that the records are in the catalog at all than that they are consistent and free of errors. Ideally, however, the records *would* be consistent and free of errors. This is where a cataloguing manual could be of great use to the library.

Traditionally, the cataloguing volunteers at the library are trained in person by the librarian. She typically arranges cataloguing days once every few months (approximately once per quarter), during which she brings in as many volunteers as possible to catalog and process books in bulk. On these days, she spends a considerable amount of time re-training the volunteers, who have not catalogued since the last bulk cataloguing day. While some of these volunteers are information professionals, many of them have no prior experience. There are no written procedures to follow for the cataloguing process.

Every book in the library falls into one of two categories: books with a Library of Congress (LoC) call number and books without - for short, the latter category can also be referred to as books "alphabetized by author" (AbA), though the descriptor is not strictly true in every case. On cataloguing days, any particular stack of books the librarian

assigns to a cataloguer will fall into only one of these categories, and is usually even more specific - teen fiction, children's books, etc. - in order to simplify the process for the volunteer. Although most fields in ResourceMate will look the same regardless of book type, there are key differences between LoC and AbA books.

Several months before this project began, the researcher worked with the librarian to create a rough draft of a cataloguing manual for the library. However, this manual could benefit greatly from feedback from the cataloguers themselves. It would also benefit the cataloguers to know that this new resource is available to them. The researcher aims to achieve both of these goals with this project.

Objectives

There are several objectives for this project:

1. The library will be left with a cataloguing manual that is useful to both the current volunteer cataloguers and those that come in the future.
2. The volunteers should be able to enter data in a manner consistent with the cataloguing manual.
3. The volunteers should know enough to recognize ambiguous situations and a) make an appropriate decision or b) ask for guidance.

Selection of participants

The librarian sent the researcher a list of eleven participants she thought would be interested in or would benefit from the project. Some of these participants already catalogued for the library, while others had no cataloguing experience at all, but all of them were established volunteers for the LGBT Center. The only criteria for participation

was that the participant be at least 18 years old and be able to attend both sessions for the full time allotted.

The researcher emailed a letter of recruitment to each participant on this list, explaining the project and sharing her contact information. Of the eight respondents, five were ultimately able to participate.

Cataloguing schedule and facilities

Because of the cataloguing schema of this particular library - LoC books and AbA books - the researcher decided to conduct two separate cataloguing sessions; one for each type. Based on prior experience, the librarian and the researcher determined that two hours would be an appropriate length of time for each session. Two hours was the maximum estimate; the researcher expected that some sessions would end early.

The researcher set up a scheduling poll online to help coordinate the cataloguing sessions. Participants were able to choose from a multitude of time slots. They were instructed to choose one four-hour slot if they preferred to do both sessions in one sitting or two two-hour slots if they preferred to sit through each session separately.

Four of the five sessions took place at the LGBT Center of Raleigh. One session took place off-site for the participant's convenience. The sessions at the Center were conducted in a private, quiet area.

Procedure

Each cataloguing session began with a more detailed explanation of the project and the signing of a consent form. Then, the participant catalogued ten books - four LoC and six AbA - with the help of the cataloguing manual. The category of each book was clearly marked, as were a few key characteristics that could not be determined without a

more thorough reading. In preparation for “cataloguing days” at the library, the librarian consistently notes such characteristics to aid the volunteers, so these “hints” reflect real-life conditions for cataloguing at the library. This part of the session was unsupervised, although the researcher remained available nearby to answer questions if necessary.

Once the ten records were completed, the researcher saved the records without any modification for later reference. Then, she gave each participant the opportunity to ask questions. Together, they walked through the records the participant had just created. The researcher called the participant’s attention to any errors and they discussed ambiguous fields. Once both the researcher and the participant felt that they understood any issues that arose, the session ended.

Feedback

After the cataloguing sessions were all complete, the researcher emailed each participant a link to an anonymous online survey with questions about their experience with the cataloguing manual. All five participants completed the survey.

IRB Review

This project was approved by the Institutional Review Board at UNC-Chapel Hill.

Results

The sessions

Four of the five participants initially signed up to do both sessions in one sitting. The fifth participant signed up to do each session separately, but the first session finished early enough that they were able to complete both sessions in one sitting after all. Four of the five sessions took between two and three hours. Only one session took the entire allotted four hours. Two of the five participants had previously catalogued for the library.

Although the researcher had planned to clearly delineate each session as focused on one type of book (LoC or AbA), and thus to go through the entire cataloguing and discussion process with one type before moving on to the next type, this is not how it worked out. In reality, four of the five participants catalogued all ten books at once (the exception being the one participant who signed up for separate sessions). The cataloguing was then followed by a discussion of both categories at once.

Otherwise, the sessions were conducted as expected.

The records

The accuracy of the records produced by the cataloguers seem to demonstrate that the manual was effective at conveying information. Repeated mistakes or ambiguities in the records indicate an area for improvement in the manual.

As part of this library's cataloguing schema, each book is assigned a coloured label based on its subject matter. A "special collection" book always receives a purple label, regardless of subject matter. Two of the five participants assigned the wrong colour to the "special collection" book. Two of the five participants assigned the wrong colour to a second book.

All five participants made minor capitalization errors.

All five participants failed to denote one particular book as a "reference" work.

Three of five participants put editor and illustrator names in the field for authors.

Two of five participants made minor errors in the author field by failing to delete extra periods and dates that had been imported automatically from the Library of Congress records.

The survey

Two of five participants said that the manual was “very easy” to use. Three of five said it was “somewhat easy” to use.

Three of five participants said they will “definitely” refer to the manual while cataloguing in the future. One participant said they “probably” will and one participant said they “don’t know” if they will refer to the manual in the future.

All five participants said that new cataloguers would benefit from the manual. Four of the five said that experienced cataloguers would benefit.

The participants were given the opportunity to list strengths and weaknesses of the manual and explain their answers. The following responses were given as strengths:

1. Organization was logical. Screenshots helped determine what areas to look for on each page.
2. It was very detailed and answered basically all of my questions. Very well done
3. It offered clear, explicit instructions. I trusted it to be able to answer most of my questions. Screenshots were very helpful.
4. Descriptions of processes step-by-step are good for someone who's never done it.
5. The screen shots and the step by step instructions were easy to follow.

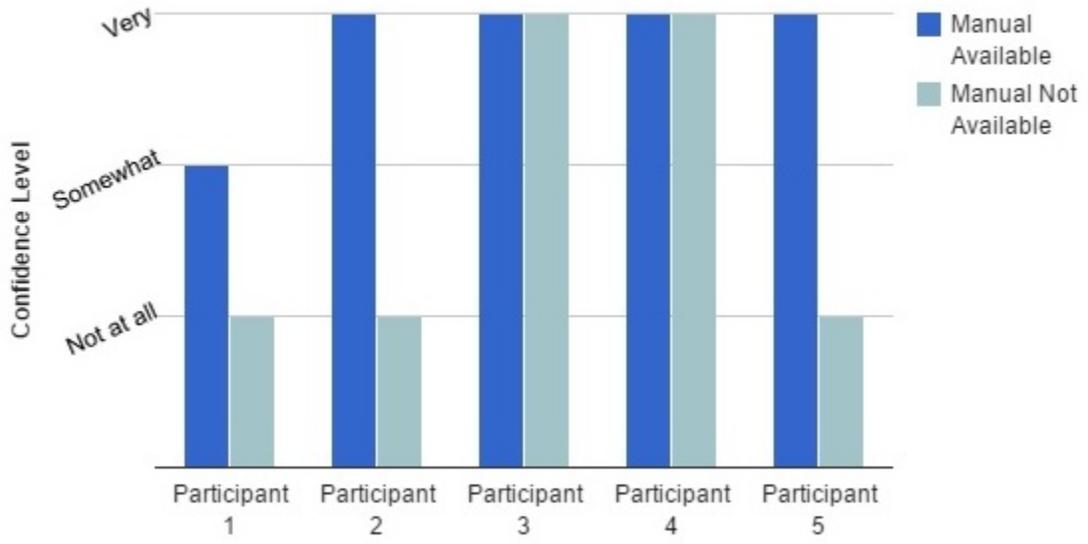
The following responses were listed as weaknesses:

1. I would try putting all the screen shots all together in one section so that people do not need to constantly flip through the manual to remember which fields need to be filled out. Also there was not a red rectangle around the Fiction Check Box and Cover field, which also needs to be filled out. Categories were somewhat difficult to determine.

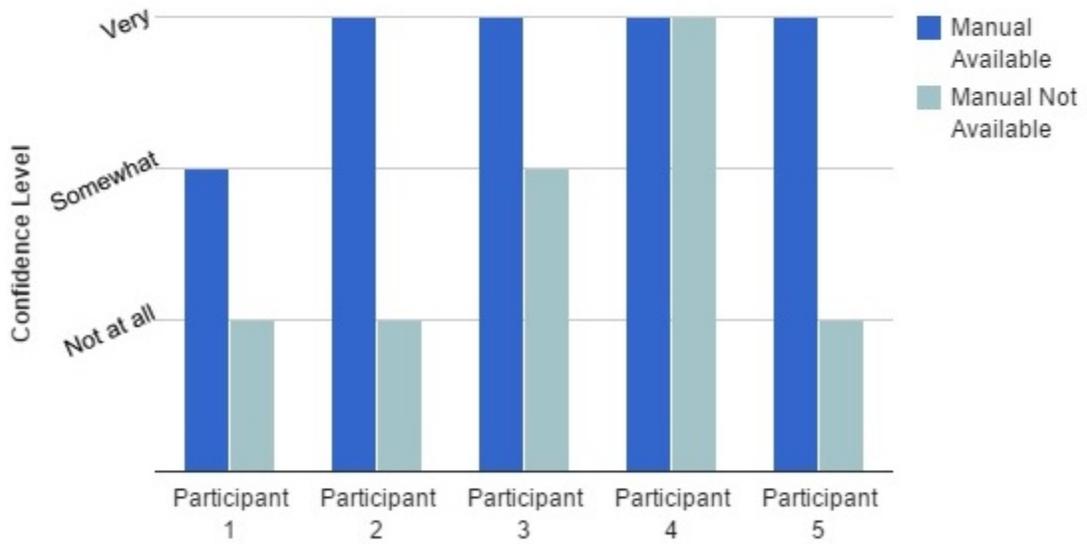
2. A note at the end about saving the entry and navigating back to the main page to start a new entry would have been great
3. I had a few questions along the way. Wit [sic] the ISBN field, someone might wonder whether they should include or remove the hyphens. I also wondered about whether to include series names in some of the records (particularly DTWOF and The Day Eazy-E Died); Amazon noted that the latter was part of a named series, but no series names appeared in the books. Maybe have some explanation of how to handle that. A few other questions I had: what if, under the multimedia tab the image is already there? Does the cataloger need to do anything? When I'm done with a record, do I need to save? What' [sic] the difference between LGBT Studies and Queer Studies? If the title has an & in it, should a cataloger transcribe as is, or change it to "and"?
4. Put "cheat sheet" of all of the graphics (with fields highlighted in red) on one page so you don't have to flip through so many pages. Also, there should be a red box around the "Cover" (Hard/Soft) field.
5. None noted

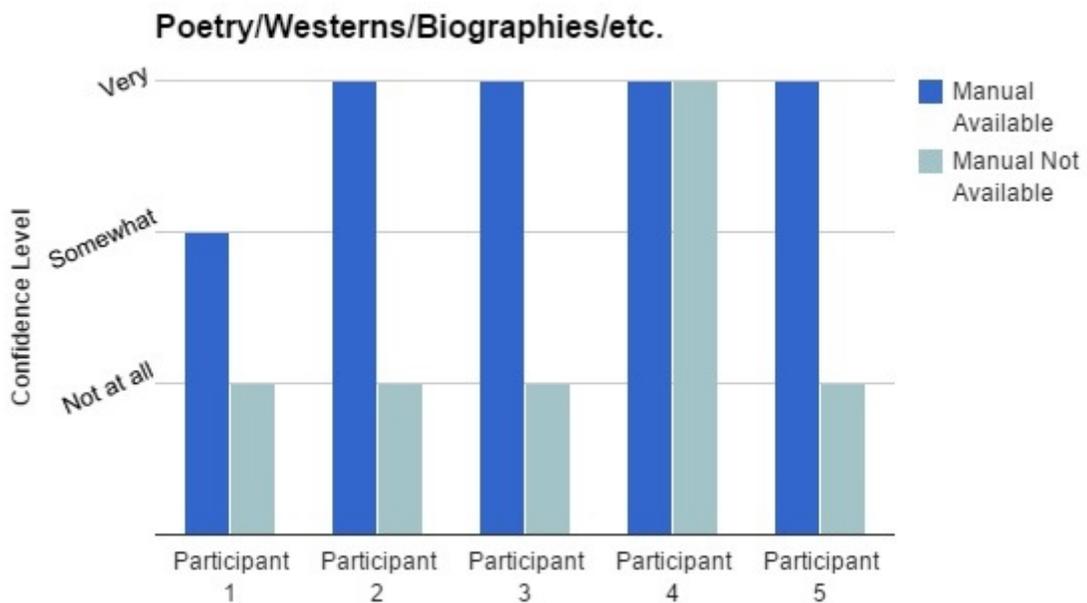
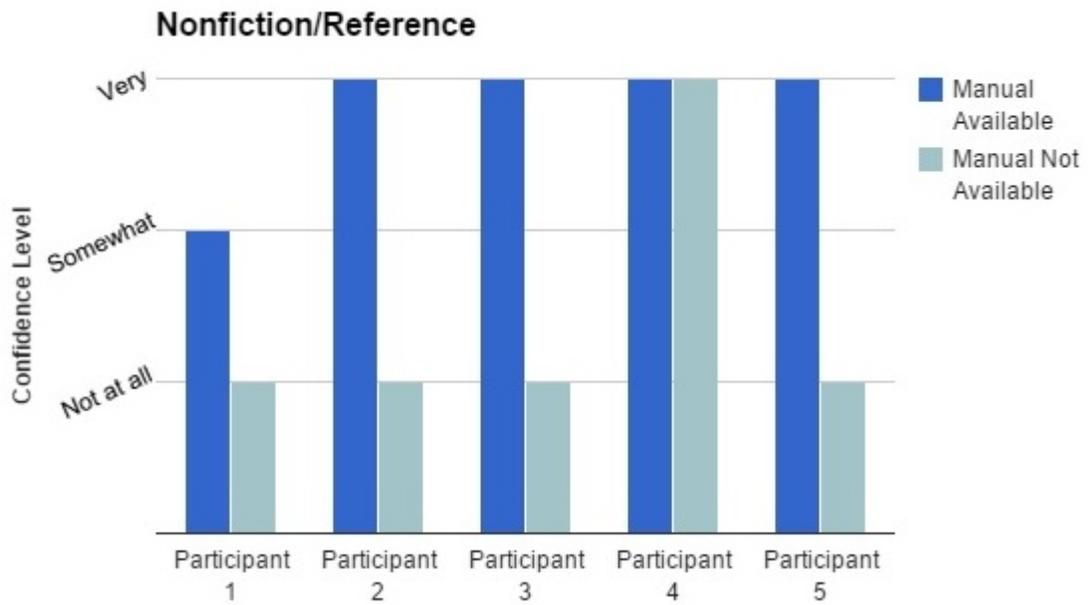
The survey asked how confident participants would feel if asked to catalog specific types of books with and without the manual. The following charts reflect their responses for “adult/teen fiction,” “children’s books,” “nonfiction/reference,” and “poetry, Westerns, biographies, etc.”

Adult/Teen Fiction



Children's Books





Discussion

One of the objectives of this project was to ensure that volunteer cataloguers “be able to enter data in a manner consistent with the cataloguing manual.” The most common errors that the cataloguers made were very minor - a matter of aesthetic and consistency, not functionality. The assignment of the wrong category and the wrong label

colour to a few of the books were more major errors, but it is very likely that the librarian would clarify these ambiguities in a real-life situation; in other words, the volunteer cataloguers would not be expected to decide whether a book should be categorized as “reference” or not. Even so, the occurrence of these major errors was unusual, overall, so it seems clear that the cataloguing manual was effective in conveying information.

A second objective of this project was to ensure that the volunteers “know enough to recognize ambiguous situations and a) make an appropriate decision or b) ask for guidance.” Although this was not measured in an objective way, part of the post-cataloguing discussion during the sessions involved clarifying any ambiguous fields. The researcher intentionally pointed out several potentially confusing areas - colours, essays vs. short stories, certain categories - and had fruitful discussions with several of the participants about the hard decisions the librarian makes when it comes to categorizing ambiguous books. The researcher emphasized the necessity of asking the librarian for clarification in ambiguous situations.

The primary objective of this project was to leave the library with “a cataloguing manual that is useful to both the current volunteer cataloguers and those that come in the future.” It has already been established that the manual was effective in conveying information, but did the participants find it useful? According to their survey responses, an overwhelming majority of them did find it useful, and they would use it again.

Challenges

The researcher diverged in only one major way from the original plan. The two separate sessions planned for AbA and LoC books bled into one session for all participants. Would conducting the sessions as originally planned have significantly

impacted the results? It is possible that the discussion at the end of the first session would have resulted in fewer errors in the second session. In fact, it seems that the way the sessions were ultimately conducted actually made it easier to evaluate the effectiveness of the manual. What seems like a “challenge” to the original plan became an opportunity.

There is one major challenge for the researcher and the library now that this project is complete: how will the manual be evaluated and revised in the future? As the collection grows, it is likely that the library will need to incorporate new categories (for example, “junior” is a recent addition to fill the gap between “children” and “teen”), new item types (audiovisual media is ever-advancing), and new patron needs. When these changes inevitably occur, who will be responsible for editing the manual? Will the edits consist of using a Sharpie and a caret on the existing manual, or will someone need to edit the original Word document and re-print the whole thing? Although the researcher will not be available forever to make such changes, it is her responsibility to help the library create a plan for a time when such needs arise.

Opportunities

Although the vast majority of the library’s collection consists of books, a relatively small - but growing - part of the collection does consist of audiovisual media. The procedure for cataloguing and processing DVDs is considerably more complicated than even the most complex books. The library could benefit from a manual for these materials.

With only five participants, it is impossible to generalize the results of this project. A larger sample would provide more accurate and generalizable information. And, with a large enough sample, a researcher could analyze the data more rigorously.

The researcher could conduct user testing on stratified groups and ask, for example, whether cataloguers with prior experience make fewer errors than cataloguers with no prior experience.

The library at the LGBT Center of Raleigh is one of the largest of its kind. Smaller libraries occasionally contact the librarian asking for advice while setting up their own collections. It is possible that the cataloguing manual could be of use to other libraries that collect LGBT materials. They can benefit from the years of trial and error that have gone into making the LGBT Center's library as patron-friendly as possible.

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Survey Questions

Q1. How easy was it to use the manual overall? (Consider clarity of instructions, organization, layout, etc.)

Very difficult Somewhat difficult Neutral Somewhat easy Very easy

Q2. What were the biggest weaknesses of the manual you used? In other words, what changes should be made?

Q3. What were the biggest strengths of the manual you used? In other words, what should be kept exactly as it is?

Q4. Will you refer to the manual in the future if you have a question while cataloguing?

Definitely will not Probably will not Don't know Probably will Definitely will

Q5. Who will benefit from the manual? (Select all that apply)

- Experienced cataloguers
- New cataloguers
- No one

Q6. If the manual was available for reference, how confident would you feel cataloguing the following items?

Adult/teen fiction?

Not at all confident Somewhat confident Very confident

Children's books?

Not at all confident Somewhat confident Very confident

Nonfiction/reference?

Not at all confident Somewhat confident Very confident

Poetry, Westerns, biographies, etc?

Not at all confident Somewhat confident Very confident

Q7. If the manual was NOT available for reference, how confident would you feel cataloguing the following items?

Adult/teen fiction?

Not at all confident Somewhat confident Very confident

Children's books?

Not at all confident Somewhat confident Very confident

Nonfiction/reference?

Not at all confident Somewhat confident Very confident

Poetry, Westerns, biographies, etc?

Not at all confident Somewhat confident Very confident

Q8. Is there any other feedback about the manual that you would like to add?

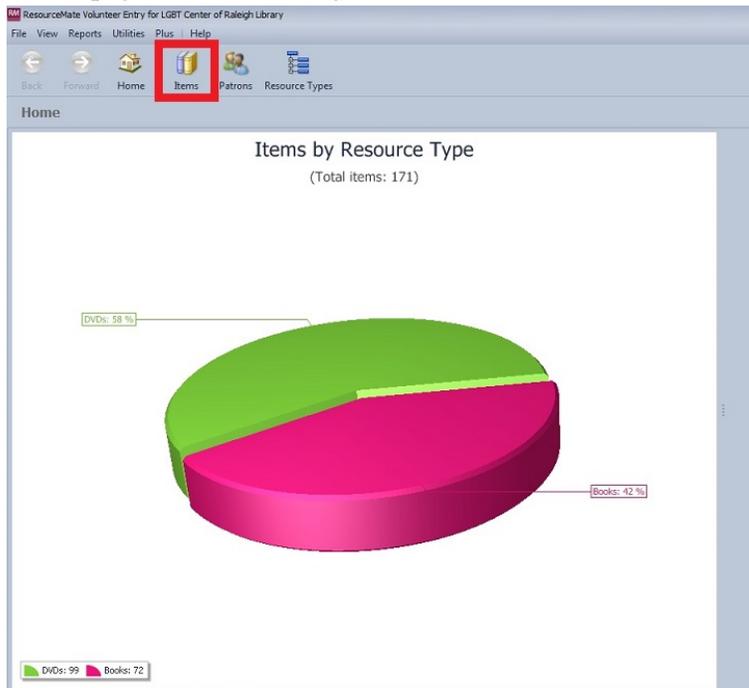
Cataloguing Manual

This is the unedited cataloguing manual used throughout this project. Please note that it is divided into two sections, labeled clearly as Library of Congress (LoC) and Alphabetized by Author (AbA).

1. Open ResourceMate by double clicking the icon on the desktop.



2. When ResourceMate opens, you should see a screen with charts. This is the ResourceMate “home page.” You can navigate to several different functions from this page.



3. In the menu at the top of the screen, click on the picture that says Items. When there are already items in the system, this will take you to a “grid” view of all items. If there is nothing catalogued yet, the grid will be blank.

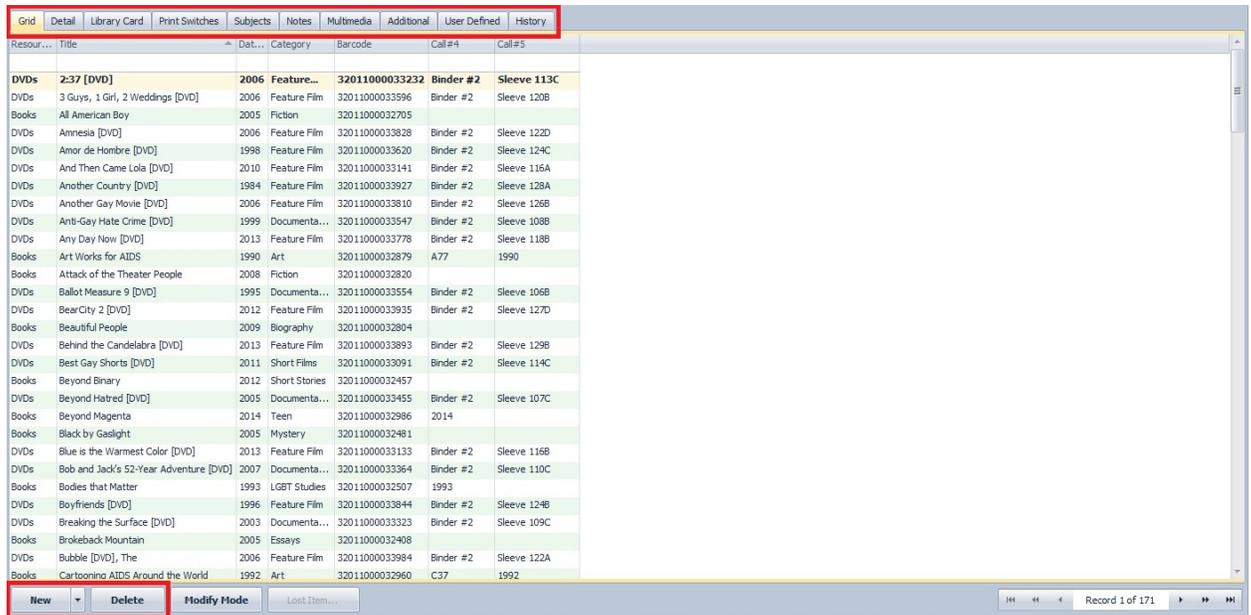
4. The grid screen is very useful because it allows you to see everything you have entered all at once. From the grid screen, you can see if you have forgotten to enter any information or quickly check for spelling mistakes. In the example picture below, there are seven columns visible: Resource Type, Title, Date, Category, Barcode, Call #4, and Call #5. Although not required, you can change these columns as needed by moving them around, adding new ones, and removing columns that you don't care about.

- To move a column, just click the top of the column (for example, where it says "Title") and drag it.
- To remove a column, right click the top of the column and select "Remove This Column" from the menu that pops up.
- To add a column, right click the top of any column and click Grid Options → Columns. A very long list will appear (you can hover over the little arrow at the bottom of the list to see more options). A checkmark next to an item on the list means that it already appears on the grid. Clicking on an item will close the menu and the item should appear as a column in the grid. You can then move it around as needed. (See the picture below.)

The screenshot displays the ResourceMate library management software interface. The main window shows a grid of items with columns for Resource Type, Title, Date, Category, Barcode, Call #4, and Call #5. A context menu is open over the 'Title' column, showing options like 'Sort Ascending', 'Sort Descending', 'Clear Sorting', 'Group By This Column', 'Remove This Column', 'Column Chooser', 'Best Fit', 'Best Fit (all columns)', 'Organize Listing Reports...', 'Generate Listing Report', 'Grid Options', 'Grid Layouts', 'Change column caption...', and 'Column options...'. The 'Grid Options' menu is further expanded to show a list of columns with checkmarks indicating which are currently visible on the grid.

Column Name	Checked
Resource Type	✓
Title	✓
Sub-Title	
Series	
Volume	
Copy Number	
Varying Form of Title	
Uniform Title	
Author	
2nd Author	
3rd Author	
Barcode	✓
ISBN	
Statement of Responsibility	
Publisher	
Date Published	✓
Place of Publication	
Section	
Call#1	
Call#2	
Call#3	
Call#4	✓
Call#5	✓
Location	
Order	
Category	✓
Pages	
Date Purchased	
Status	
Replacement Value	
Include in Mass % Change	
Checked Out	
Expected Back	
Check In Date	
Is Checked Out	

5. Along the top of the grid, you should see many tabs that say Detail, Library Card, etc. You can navigate freely between these tabs without losing your saved work. You'll have to edit information in each of these categories as part of completing the record.



6. Now that you know how to set up the grid screen, you can create a record! On the Grid tab, in the bottom left corner, you should see a button that says New (it's highlighted above). Clicking this button will create a new record. It will automatically start you on the Detail tab.

7. This is where the process begins to differ depending on the type of resource (books, DVDs, etc.). Follow the appropriate instructions.



Books with LoC Call Numbers



Non-Fiction Reference

The good news for books is that ResourceMate can usually import book information from other sources. However, you still need to clean up the imported information and enter information that can't be imported.

To import information, enter the ISBN. It is the first field under the Details tab. Press Enter (or click the button that says ISBN Retrieval). After a few seconds, it will (hopefully) open a new window. ResourceMate looks for information from the Library of Congress, Duke University, and Amazon. Once the new window opens, you will be able to choose which record you would prefer to import. The Library of Congress record is usually the most complete, but remember that you will still need to do some editing. Once you have selected the record you wish to import, click Import.

These are the fields that will need to be filled in for all books. You can find more detail about each field below this list. All fields are mandatory unless otherwise stated.

- Resource Type
- Title
- Sub-Title
- Series, if applicable
- Volume, if applicable
- Edition, if applicable
- Author(s)/Editor/Illustrator
- Publisher
- Place of Publication
- Date Published
- Pages
- Category
- Location
- Replacement Value
- Section
- Call Numbers
- Fiction?
- Cover
- Barcode
- Print Switches (specifically Print Spine Labels)
- Notes
- Multimedia
- Donated By (if applicable)
- User Defined (Color)

Detail tab

The screenshot shows a library catalog detail tab for a DVD. The form is divided into several sections. At the top, there are tabs for Grid, Detail, Library Card, Print Switches, Subjects, Notes, Multimedia, Additional, User Defined, and History. The main form has a header with ISBN (0778612638), Resource Type (DVDs), and a Copy # 1 icon. Below this, there are fields for Title (2:37 [DVD]), Sub-Title, Series, Uniform Title, and Varying Form of Title. The Series field has Volume and Edition sub-fields. The Author field is filled with Thaluri, Murali K. The Publisher field is filled with M2 Entertainment, Kojo Pictures. The Date Published field is filled with 2006. On the right side, there are fields for Pages (95), Status, Category (Feature Film), Location (Main), Replacement Value (\$24.98), Date Purchased, Purchase Price, and WEB site. The Replacement Value field has a dropdown menu and a checkbox for 'Include in Mass % ...' which is checked.

1. Resource Type

Select Books from the dropdown menu. This includes all books - children's, adult, fiction, and nonfiction.

2. Title

Enter the title exactly as it appears on the title page of the book. Most words in the title should be capitalized, but there are exceptions. Words such as “of,” “the,” “a,” “an,” “and,” or “with” should be lowercase if they are in the middle of the title. If they are the first word in the title, they should remain capitalized. Numbers should appear as they do on the title page.

Examples:

- Attack of the Theater People
- Five Ways a Boy Can Break Your Heart
- Bodies that Matter

If the title starts with “The,” “A,” or “An,” it is a special case. These words should be moved to the end of the title and placed after a comma.

Examples:

- Fault in Our Stars, The
- History of Sexuality, The

3. Sub-Title

Enter the subtitle exactly as it appears on the title page of the book. As with the Title field, capitalize all words except those such as “of,” “the,” “a,” “an,” or “with.” It is okay to start the subtitle with “A,” “And,” or “The,” so leave these words at the beginning.

Examples:

- A Resource for the Transgender Community
- An Anthology of Nonfiction

4. Series, if applicable

Not all books will be part of a series, so this field will usually be blank. If there is a series name, enter it as it appears on the title page of the book. Apply the same capitalization rules used in the Title and Sub-Title field.

5. Volume, if applicable

This field only applies to books that are part of a series. Not all books will be part of a series, so this field will usually be blank. Enter the volume as a number (3 instead of three).

6. Edition, if applicable

This field is not mandatory. If the edition is imported, it is okay to leave it in this field. If the book lists an edition, it is okay to fill it in as it appears on the book. Otherwise, don't worry about this field.

7. Author(s)/Editor/Illustrator

List the author names as they appear on the title page. If there are multiple authors, list as many as possible. If there is no author listed, but instead an editor or multiple editors, enter those names instead (you can enter them in the Editor field and use the Author fields for overflow.) If the Illustrator field is relevant (most often for children's books), fill that in as well.

Enter names as "Last, First" only. There should not be a period, a comma, or a date after the name. If there is, delete it. (If the Backspace key doesn't seem to work, try the Delete key instead.) The exception to this is if there is an initial - then there should be a period.

Examples:

- Pitt, Brad
- Cuoco-Sweeting, Kaley
- Rowling, J. K.
- Griffin, Bob R.

8. Publisher

The publisher will usually be listed on the title page of the book. If not, check the copyright information. The name should be entered as it appears in the book. Usually, every word will be capitalized.

9. Place of Publication

This is the location of the publisher, or where the book was published. Like the publisher, it might be on the title page of the book or on the copyright page. If you are unable to find a location at all, it is okay to leave this blank. The location should be entered like this:

- Los Angeles, CA

- Raleigh, NC
- Paris, France

10. Date Published

This is the publication year of the book. Usually, you can find this on the copyright page after the copyright symbol (©). Use the date of original publication rather than the date of later editions (so if a book was originally published in 1972, use that date, even if the version you're holding was printed in 1999). Enter the date as the year only.

11. Pages

This field should contain the number of pages in the book. Flip to the end to find the last numbered page. Enter this value as a number. If the pages aren't numbered or if they are numbered irregularly, leave this blank.

Good example:

- 149

Bad examples:

- 149 p.
- 149 pages

12. Category

The category influences the sticker that the book gets before it is placed on the shelf, so it really helps people find books while browsing. It is very important that you use the existing categories and do not add a new category. If you think a new category should be created, speak to Erin first. The following categories are all for non-fiction and reference books, which receive a Library of Congress call number. A book may fit into multiple categories; choose the primary category if possible.

- Allies
- Art
- Coming Out
- Essays
 - This category is for collections of essays. These are usually nonfiction, and not the same as short stories.
- Family
 - This category is for books directed at family members of LGBTQ individuals.
- Health
 - This category is for up-to-date, nonfiction health materials.
- History
- Humor
- Law
- LGBT Studies
 - This is the catch-all category for nonfiction books. If it doesn't fit anywhere else, it will probably fit here.

- Military
- Music
- Parenting
 - This category is for parents who identify as LGBTQ, NOT for parents of LGBTQ individuals.
- Queer Studies
- Reference
 - These books cannot be leave the library. They might be rare, or something that will be used often.
- Relationships
 - This category is specifically for romantic relationships, as opposed to friendships or other types of relationships.
- Religion
- Self Help
- Social Issues
- Special Collection
 - These books are kept in the locked cabinet. They are usually rare, valuable, or sexually explicit.

13. Location

This is where the book will be located in the library. Here is a list of possible locations and what they mean:

- Main
 - This is the majority of the library.
- Offsite
 - This is offsite storage. It means that the item is not in the library.
- Reference
 - This refers to the reference shelves. Only reference items are assigned to this location.
- Special Collection
 - This is the locked cabinet for items in the Special Collection.

14. Replacement Value

It is very important that the price be filled in for every item, because this is how the librarian assesses the value of the collection. Check the following places for the price:

- You can often find the price on the back of the book or inside one of the covers.
- If it's not on the book itself, you can find most prices by searching for the item on Amazon. Amazon sells items at a discounted price, which is NOT the price you want to enter. If you look closely, there is usually a price that is crossed out next to the Amazon price. This is the original publisher price, and this is the number you should enter in the Price field.
- If you are unable to find the original publisher price on Amazon, you can often buy items directly from the publisher website. Check the publisher website if possible.

- If the item is out of print, there may not be a publisher price listed anywhere. In that case, it is acceptable to look at what the “used” item is selling for and enter that price.

Library Card tab

15. Section

This varies depending on the type of book. It will remain empty for most nonfiction books, with the exception of reference books (REF) or books that belong in the special collection (SPEC).

16. Call Number(s)

Call numbers change depending on the type of book you are cataloguing. Nonfiction books are assigned a Library of Congress call number, which look something like this: PR6039.O32 L6 2002. All those letters and numbers mean something, but don't worry! You won't have to make it up. If you imported a record, it might have automatically imported the call number. If not, you can look up the book in another library's catalog and borrow the call number they use.

Here is a list of what should be placed in each Call # field:

- Call #1
 - This field will contain the first part of the Library of Congress call number. In our example, that would be PR.
- Call #2
 - This should contain the second part of the Library of Congress call number. In our example, this would be 6039.
- Call #3
 - This should contain the third part of the Library of Congress call number. In our example, this would be .O32.
- Call #4
 - This should contain the fourth (and sometimes last) part of the Library of Congress call number. In our example, this would be L6.
- Call #5

- This field should contain the last part of the Library of Congress call number, if there is one. In our example, this would be 2002. Otherwise, leave it empty.

17. Fiction?

For nonfiction and reference books, this box should always be left unchecked.

18. Cover

Enter “Hard” or “Soft”, depending on the book.

19. Barcode

This field is for the barcode assigned by the library. All barcodes will begin with 32011 followed by nine unique digits. The record will not save until you have entered a valid barcode.

Print Switches tab

Number of card sets to print	
Print Author Cards	0
Print 2nd Author Cards	
Print 3rd Author Cards	
Print Illustrator Cards	
Print Editor Cards	
Print Stat. Resp. Cards	
Print Shelf (Inventory) Cards	
Print Title Cards	
Print SubTitle Cards	
Print Series Cards	
Print Uniform Title Cards	
Print Varying Form of Title Cards	
Print Subject Cards	

Number of labels to print	
Print Spine Labels	1
Print Signout Labels	
Print Pocket Labels	

20. Print Spine Labels

This page should already be filled out correctly, but check to make sure that there is a 1 in the “Print Spine Labels” field and that all of the other fields are blank.

Notes tab

Grid Detail Library Card Print Switches Subjects **Notes** Multimedia Additional User Defined History

Note (General)

Circulation Note

Circulation Note Action Both Check In and Check Out

Save Cancel

21. Notes (General)

This field is for a short summary of the book that will show up when people browse the catalog. You can copy and paste a summary from Amazon. If you are unable to find any kind of summary, it is okay to leave this field blank. Be sure to check the summary for spelling errors, weird characters, or anything else to make it look more professional.

Multimedia tab

Grid Detail Library Card Print Switches Subjects Notes **Multimedia** Additional User Defined History

Add... Change Delete Export

1. JPEG Image
Local File

Add New Multimedia Resource

1. Browse for a local file Online Resource From Web Camera From Twain Device From Clipboard

Selected Multimedia Resource

None is selected
<Please select from the sources above>

2. Multimedia Type: <select a value or type a new one>
Multimedia Name: <select a value or type a new one>

3. Embedded Resource

When checked the multimedia will be embedded into the database and available offline. Otherwise only link will be stored in the database and each time when accessed will be downloaded from the source.

Save Cancel

Save Cancel

22. Multimedia

If you imported a record using the ISBN, ResourceMate will automatically import a cover via Amazon. If, for some reason, there is no cover already on this page, you will need to find the cover image online.

- First, check Amazon. If it is not there, try searching Google for “cover [title of book]”. Once you find an image, right click over the image and select “Save picture as.” You can then save the image to a folder (make sure you know where you’re saving it!).
- After it is saved, return to the Multimedia tab and click the Add button (highlighted above, in the upper left corner). That will open a new window, which you can see on the right.
- Select “Browse for a local file” (highlighted in red). Find the image you just saved.
- After you import it, make sure that the check box next to “Embedded Resource” has a check in it. If it does not, you will lose this image later on.
- Click Save.

Additional tab

The screenshot shows the 'Additional' tab in the ResourceMate interface. The 'Language' field is set to 'English'. The 'Physical Description' field is highlighted with a red box. The 'Donated By' field is also highlighted with a red box. Other fields include ISSN, Source, Large Print, Condition, Rating, Lexile Code, Lexile Number, Lexile measure, Pamphlet Inventory, and Reading Program.

23. Language

Only fill this in if the book is in a language other than English.

24. Donated By (if applicable)

If you know who a book was donated by, enter their name in this field. You should enter it as “First Last” or, if it is an organization, make sure to capitalize the appropriate words. Ask Erin if you have any questions.

User Defined tab

25. Color

The color field is very important. The color labels on library materials help people find items of interest when they browse the shelves. Enter the color as “Yellow” or “Red.” Some items may fall into multiple categories; in these cases, it is usually best to choose the primary category. Here are the colors and what they mean:

- Orange: Gay male

- Yellow: Lesbian
- Red: Bisexual
- Blue: Queer
 - This applies to anything outside of the gender binary, which includes but is not limited to genderqueer and gender neutral.
- Green: Transgender
- Purple: Special collection
 - All items in the special collection receive a purple label, even if they fall into another category.
- Clear: General interest OR multiple colors apply equally
 - Right now, the library does not use multiple colors for a single book. If there is no color that would best fit (for example, because one of the main characters is gay and one of them is transgender), use Clear.



Books Alphabetized by Author



All Fiction Children's Books Westerns, Poetry, etc.

The good news for books is that ResourceMate can usually import book information from other sources. However, you still need to clean up the imported information and enter information that can't be imported.

To import information, enter the ISBN. It is the first field under the Details tab. Press Enter (or click the button that says ISBN Retrieval). After a few seconds, it will (hopefully) open a new window. ResourceMate looks for information from the Library of Congress, Duke University, and Amazon. Once the new window opens, you will be able to choose which record you would prefer to import. The Library of Congress record is usually the most complete, but remember that you will still need to do some editing. Once you have selected the record you wish to import, click Import.

These are the fields that will need to be filled in for all books. You can find more detail about each field below this list. All fields are mandatory unless otherwise stated.

- Resource Type
- Title
- Sub-Title
- Series, if applicable
- Volume, if applicable
- Edition, if applicable
- Author(s)/Editor/Illustrator
- Publisher
- Place of Publication
- Date Published
- Pages
- Category
- Location
- Replacement Value
- Section
- Call Numbers
- Fiction?
- Cover
- Barcode
- Print Switches (specifically Print Spine Labels)
- Notes
- Multimedia
- Donated By (if applicable)

- User Defined (Color)

Detail tab

The screenshot shows a library catalog detail form with the following fields and values:

ISBN	0778612638	ISBN Retrieval	Library Search	Setup...
Resource Type	DVDs	Copy # 1		
Title	2:37 [DVD]			
Sub-Title				
Series		Volume	Edition	
Uniform Title				
Varying Form of Title				
Author	Thaluri, Murali K.	Pages	95	
2nd Author		Status		
3rd Author		Category	Feature Film	
Illustrator		Location	Main	Order
Editor		Replacement Value	\$24.98	Include in Mass % ... <input checked="" type="checkbox"/>
Publisher	M2 Entertainment, Kojo Pictures	Date Purchased		
Place of Publication		Purchase Price		
Date Published	2005	WEB site		

1. Resource Type

Select Books from the dropdown menu. This includes all books - children's, adult, fiction, and nonfiction.

2. Title

Enter the title exactly as it appears on the title page of the book. Most words in the title should be capitalized, but there are exceptions. Words such as "of," "the," "a," "an," "and," or "with" should be lowercase if they are in the middle of the title. If they are the first word in the title, they should remain capitalized. Numbers should appear as they do on the title page.

Examples:

- Attack of the Theater People
- Five Ways a Boy Can Break Your Heart
- Bodies that Matter

If the title starts with "The," "A," or "An," it is a special case. These words should be moved to the end of the title and placed after a comma.

Examples:

- Fault in Our Stars, The
- History of Sexuality, The

3. Sub-Title

Enter the subtitle exactly as it appears on the title page of the book. As with the Title field, capitalize all words except those such as “of,” “the,” “a,” “an,” or “with.” It is okay to start the subtitle with “A,” “And,” or “The,” so leave these words at the beginning.

Examples:

- A Resource for the Transgender Community
- An Anthology of Nonfiction

4. Series, if applicable

Not all books will be part of a series, so this field will usually be blank. If there is a series name, enter it as it appears on the title page of the book. Apply the same capitalization rules used in the Title and Sub-Title field.

5. Volume, if applicable

This field only applies to books that are part of a series. Not all books will be part of a series, so this field will usually be blank. Enter the volume as a number (3 instead of three).

6. Edition, if applicable

This field is not mandatory. If the edition is imported, it is okay to leave it in this field. If the book lists an edition, it is okay to fill it in as it appears on the book. Otherwise, don't worry about this field.

7. Author(s)/Editor/Illustrator

List the author names as they appear on the title page. If there are multiple authors, list as many as possible. If there is no author listed, but instead an editor or multiple editors, enter those names instead (you can enter them in the Editor field and use the Author fields for overflow.) If the Illustrator field is relevant (most often for children's books), fill that in as well.

Enter names as “Last, First” only. There should not be a period, a comma, or a date after the name. If there is, delete it. (If the Backspace key doesn't seem to work, try the Delete key instead.) The exception to this is if there is an initial - then there should be a period.

Examples:

- Pitt, Brad
- Cuoco-Sweeting, Kaley
- Rowling, J. K.
- Griffin, Bob R.

8. Publisher

The publisher will usually be listed on the title page of the book. If not, check the copyright information. The name should be entered as it appears in the book. Usually, every word will be capitalized.

9. Place of Publication

This is the location of the publisher, or where the book was published. Like the publisher, it might be on the title page of the book or on the copyright page. If you are unable to find a location at all, it is okay to leave this blank. The location should be entered like this:

- Los Angeles, CA
- Raleigh, NC
- Paris, France

10. Date Published

This is the publication year of the book. Usually, you can find this on the copyright page after the copyright symbol (©). Use the date of original publication rather than the date of later editions (so if a book was originally published in 1972, use that date, even if the version you're holding was printed in 1999). Enter the date as the year only.

11. Pages

This field should contain the number of pages in the book. Flip to the end to find the last numbered page. Enter this value as a number.

Good example:

- 149

Bad examples:

- 149 p.
- 149 pages

12. Category

The category influences the sticker that the book gets before it is placed on the shelf, so it really helps people find books while browsing. It is very important that you use the existing categories and do not add a new category. If you think a new category should be created, speak to Erin first. All of the following categories are grouped together because, on the shelf, they are “alphabetized by author.”

- Biography
 - This category is used for biographies, autobiographies, and memoirs.
- Children's Book
 - For children ages 0-8
- Drama
 - This category is for plays or scripts.
- Fantasy
- Fiction
 - This is the catch-all category for fiction books. If it doesn't fit anywhere else, put it here.
- Graphic Novel
- Junior
 - This category is for children ages 9-12.

- Mystery
- Poetry
- Science Fiction
- Short Stories
 - Short stories are usually fiction, as opposed to essays, which are usually nonfiction. The book will often say clearly.
- Teen
 - This category is for people ages 13-19.
- Teen Biography
 - This category is for biographies and autobiographies by and about teenagers.
- Western

13. Location

This is where the book will be located in the library. Here is a list of possible locations and what they mean:

- Main
 - This is the majority of the library.
- Offsite
 - This is offsite storage. It means that the item is not in the library.
- Reference
 - This is the reference shelves. Only reference items are assigned to this location.
- Special Collection
 - This is the locked cabinet for items in the Special Collection.

14. Replacement Value

It is very important that the price be filled in for every item, because this is how the librarian assesses the value of the collection. Check the following places for the price:

- You can often find the price on the back of the book or inside one of the covers.
- If it's not on the book itself, you can find most prices by searching for the item on Amazon. Amazon sells items at a discounted price, which is NOT the price you want to enter. If you look closely, there is usually a price that is crossed out next to the Amazon price. This is the original publisher price, and this is the number you should enter in the Price field.
- If you are unable to find the original publisher price on Amazon, you can often buy items directly from the publisher website. Check the publisher website if possible.
- If the item is out of print, there may not be a publisher price listed anywhere. In that case, it is acceptable to look at what the "used" item is selling for and enter that price.

Library Card tab

The screenshot shows the 'Library Card' tab in a library management system. The 'Call Number Information' section is highlighted with a red box, showing fields for Section (DVD), Call #1 (Two), Call #2, Call #3, Call #4 (Binder #2), and Call #5 (Sleeve 113C). Other fields include ISBN (0778612638), Accession Number (0), and Barcode (32011000033232). The 'Bibliography' and 'Body of Card' sections are also visible.

15. Section

For the following types of books, this is the first line of the call number. It corresponds with the Category you selected in step 12, so it will vary depending on the type of book. Here is a list of possible values and what they mean:

- B: Biography
 - Use this for biographies, autobiographies, and memoirs.
- CB: Children's Books
 - Use this for fiction books directed at children aged 0-8.
- Dr: Drama
- Fa: Fantasy
- F: Fiction
 - Use this for works of fiction that do not fall into any other category.
- GN: Graphic Novel
- Hu: Humor
- J: Junior
 - Use this for fiction books directed at children aged 9-12.
- M: Mystery
- Po: Poetry
- SF: Science Fiction
- SS: Short Stories
- T: Teen
 - Use this for fiction books aimed at teens.
- TB: Teen Biography
 - Use this for biographies and autobiographies written by and about teenagers.
- W: Western

16. Call Number(s)

Call numbers change depending on the type of book you are cataloguing. Books alphabetized by author require only the Call #1 field to be filled in. If you get to this section and there is already a Library of Congress call number filled in, **delete it**. Here is a list of what should be placed in each Call # field:

- Call #1
 - This field should contain the last name of the primary author.
 - For biographies only, this should contain the last name of the person the book is about (NOT the author).
- Call #2-5
 - These fields will be left empty.

17. Fiction?

If the book is fiction, especially if it's a novel, make sure this box is checked.

18. Cover

Enter "Hard" or "Soft", depending on the book.

19. Barcode

This field is for the barcode assigned by the library. All barcodes will begin with 32011 followed by nine unique digits. The record will not save until you have entered a valid barcode.

Print Switches tab

The screenshot displays the 'Print Switches' tab within a library cataloging interface. The interface is organized into two main sections: 'Number of card sets to print' and 'Number of labels to print'. The 'Number of card sets to print' section includes options for 'Print Author Cards', 'Print 2nd Author Cards', 'Print 3rd Author Cards', 'Print Illustrator Cards', 'Print Editor Cards', 'Print Stat. Resp. Cards', and 'Print Shelf (Inventory) Cards'. The 'Number of labels to print' section includes options for 'Print Spine Labels', 'Print Signout Labels', and 'Print Pocket Labels'. The 'Print Spine Labels' option is highlighted with a red box, and its value is set to 1. The interface also features a navigation bar at the top with tabs for 'Grid', 'Detail', 'Library Card', 'Print Switches', 'Subjects', 'Notes', 'Multimedia', 'Additional', 'User Defined', and 'History'.

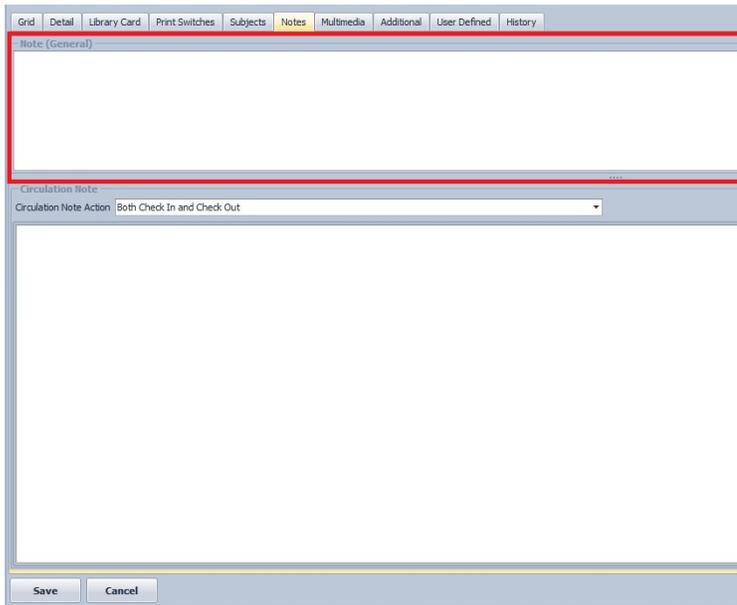
Number of card sets to print	
Print Author Cards	0
Print 2nd Author Cards	
Print 3rd Author Cards	
Print Illustrator Cards	
Print Editor Cards	
Print Stat. Resp. Cards	
Print Shelf (Inventory) Cards	

Number of labels to print	
Print Spine Labels	1
Print Signout Labels	
Print Pocket Labels	

20. Print Spine Labels

This page should already be filled out correctly, but check to make sure that there is a 1 in the “Print Spine Labels” field and that all of the other fields are blank.

Notes tab

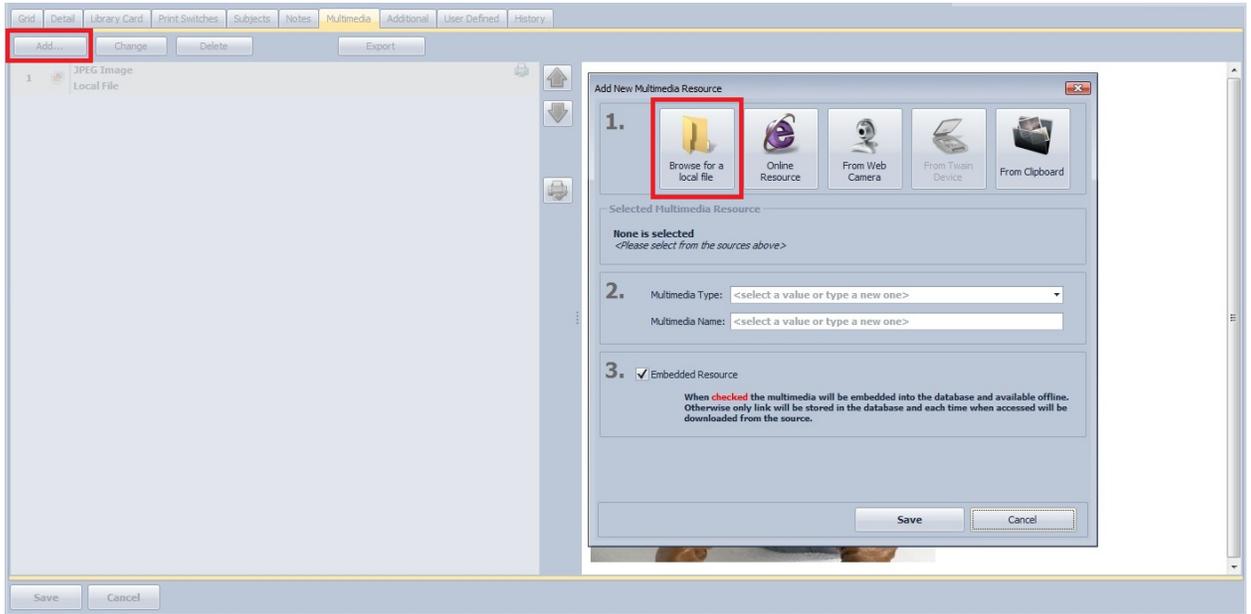


The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Grid, Detail, Library Card, Print Switches, Subjects, Notes (highlighted in yellow), Multimedia, Additional, User Defined, and History. Below the tabs is a large text area labeled "Note (General)" which is outlined with a red border. Below this is a section labeled "Circulation Note" containing a dropdown menu for "Circulation Note Action" with the value "Both Check In and Check Out" selected. At the bottom of the interface are two buttons: "Save" and "Cancel".

21. Notes (General)

This field is for a short summary of the book that will show up when people browse the catalog. You can copy and paste a summary from Amazon. If you are unable to find any kind of summary, it is okay to leave this field blank. Be sure to check the summary for spelling errors, weird characters, or anything else to make it look more professional.

Multimedia tab

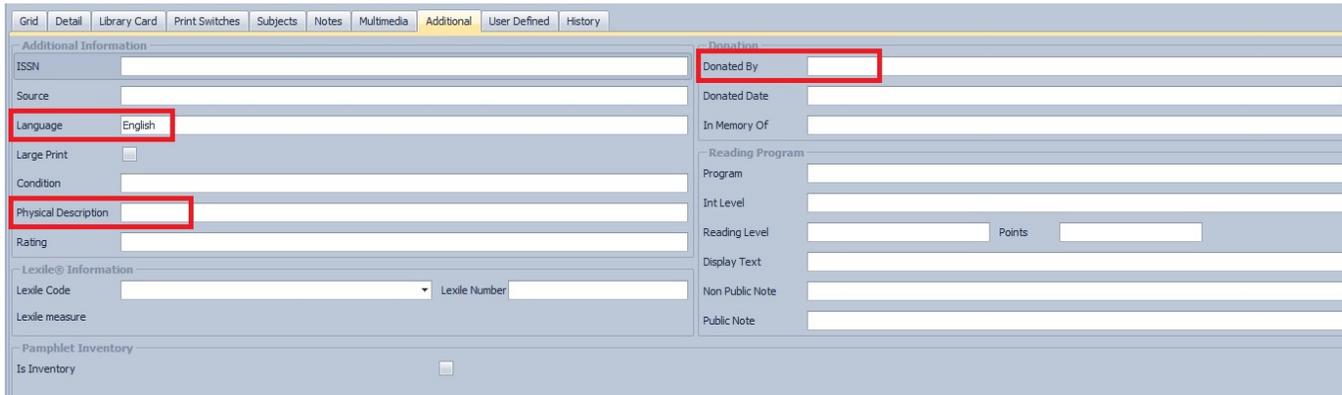


22. Multimedia

If you imported a record using the ISBN, ResourceMate will automatically import a cover via Amazon. If, for some reason, there is no cover already on this page, you will need to find the cover image online.

- First, check Amazon. If it is not there, try searching Google for “cover [title of book]”. Once you find an image, right click over the image and select “Save picture as.” You can then save the image to a folder (make sure you know where you’re saving it!).
- After it is saved, return to the Multimedia tab and click the Add button (highlighted above, in the upper left corner). That will open a new window, which you can see on the right.
- Select “Browse for a local file” (highlighted in red). Find the image you just saved.
- After you import it, make sure that the check box next to “Embedded Resource” has a check in it. If it does not, you will lose this image later on.
- Click Save.

Additional tab



23. Language

Only fill this in if the book is in a language other than English.

24. Donated By (if applicable)

If you know who a book was donated by, enter their name in this field. You should enter it as “First Last” or, if it is an organization, make sure to capitalize the appropriate words. Ask Erin if you have any questions.

User Defined tab

25. Color

The color field is very important. The color labels on library materials help people find items of interest when they browse the shelves. Enter the color as “Yellow” or “Red.” Some items may fall into multiple categories; in these cases, it is usually best to choose the primary category. Here are the colors and what they mean:

- Orange: Gay male
- Yellow: Lesbian
- Red: Bisexual
- Blue: Queer
 - This applies to anything outside of the gender binary, which includes but is not limited to genderqueer and gender neutral.
- Green: Transgender
- Purple: Special collection
 - All items in the special collection receive a purple label, even if they fall into another category.
- Clear: General interest OR multiple colors apply equally
 - Right now, the library does not use multiple colors for a single book. If there is no color that would best fit (for example, because one of the main characters is gay and one of them is transgender), use Clear.