

**We understand that some materials may not be able to leave your library. Our clients often prefer to have Backstage catalog from surrogates, rather than shipping original items. If you will be sending surrogates, the following guidelines will help you in preparing your materials.**

## CATALOGING FROM SURROGATES

In the context of cataloging, surrogates are, simply put, scanned or photocopied images of the pages that a cataloger refers to when searching copy or creating original records.

To keep multiple images from an item grouped together, your surrogates should be numbered or have a unique identifier assigned to them.

- For digital files (PDF or JPEG), include a number or unique identifier in each file name.
- For photocopies, please number the first page of each item and staple or clip pages together.

The content that should be captured in surrogate form varies by material type.

## MONOGRAPHS

For monographs, please include images of:

- Cover
- Spine
- Title page
- Title page verso
- Series title page, if applicable
- Table of contents
- Introduction or a portion of the first chapter
- Illustrations that may appear throughout the text, including plates
- Last numbered page
- Any other pages that might be pertinent to cataloging the item



## SERIALS

For multi-volume sets or serials, provide the images specified under monographs, but only for the first volume or issue.

For each subsequent volume or issue, you may opt to just include title page and verso images with the specific volume and issue numbering.

## SOUND RECORDINGS

For sound recordings (CD, LP), include images of:

- Case front
- Case back
- Case insert, if present
- Disc front
- Disc back, for LPs and other media where information is visible on back

## MOVING IMAGE RECORDINGS

For moving images (DVD, Blu-ray), include images of the following:

- Case front
- Case back
- Case insert, if present
- Disc front
- Screen shots of opening credits

# PREPARING CATALOGING SURROGATES

## HOLDINGS

Backstage can generate holdings from information you provide as a spreadsheet, text file, or written on photocopied or printed surrogates.

If you would like us to generate holdings, please include the following information, as applicable:

- Call number, if already determined
  - Dewey class number/cutter, Dewey suffix
  - LC class number/cutter
  - Local class number/cutter
- Location/collection

If the locations/collections are grouped together and marked clearly, it will not be necessary to label each page.
- Copy information

Capture one title page and mark the number of copies on that page.
- Volume information, part numbers, or issue years

For example:

  - volumes 1-4
  - parts 2-6
  - issues 1925–1933
- Prices
- Barcode numbers
- Accession numbers, acquisition dates
- Vendors
- Funding sources

## ADDITIONAL SOURCES OF INFORMATION

If you've already collected metadata that you would like to have included in the records or used as a source, please send that to us as well.

If you have any questions about preparing surrogates or existing metadata, please contact your Backstage project manager or account representative.

