

# CARL Conversations: May 5, 2021

## Topic: OCLC Workflow

### Question and Answer Session

1. What are the “quick” steps for adding an item using OCLC?

Please refer to the document John made for detailed instructions. But here are the “quick” steps:

- Use CARL Matcher File search to check the system for the item
- If no records found go to OCLC and add to the list
  - Login at <https://infosoup.share.worldcat.org/wms/cmnd/>
  - Click Metadata, then Record Manager
  - Enter in any info you’d like, then Search
  - If you’d like, limit with the facets on the left-hand side
  - Remember, a red circle means items aren’t held by us
  - Click on Edit button you can see full MARC record
  - When comfortable the record matches, click Record > Send to > Export List, highlight the list and click Add

2. Are the logins individual or institution?

There are four (4) user accounts created based on geography that John sent out with the credentials. Libraries can share the login credentials with any staff who would need it. If you did not receive this information, you can email OWLSnetHelp.

3. How do you determine a record that is a vendor record vs a record staff can export?

Incomplete records fall under a few different names: vendor records, order records, stubby records, short records, brief records, etc. They serve as place holders so staff can attach their order records and display them in the catalog for the purpose of giving patrons the ability to place a hold.

These brief records often have the author and/or title in all caps and/or they do not have a 300 field, 520 field for a summary, or subject headings. In OCLC they are often marked as “Min” for Minimum in the record preview.

Due to their lack of information, we do not want to bring in another library system’s placeholder records because they may not match the format our libraries have on hand.

Many of the records you select will say “Pre” or “Full” in the record preview, but the best record available may also be marked as “Min.” Remember that these records are being updated often (by other libraries and OCLC staff) and then approved. Make sure you look at the MARC record and select the one that most closely matches your item by looking for subject headings, summary, author, title, etc... to aid with your selection.

4. If I have open requests with CatHelp, should I start working on these or leave them for the catalogers?

If you have time and want to get your items in the catalog faster, then you can work on them. But if you do so and add them to the Export List, please let CatHelp know so they can take the request out of the system.

5. At times it seems as though OCLC is indexing library vendor bibs. Is there any way that staff can put something in their vendor bibs so OCLC won't do this?

This is still an ongoing process where cataloging is identifying those and updating them. But cataloging doesn't think so. This is how OCLC grows. Eventually they look at it and combine it with another record or overlay it.

6. If we don't see our item/record in OCLC, it doesn't exist, should we be sending those to CatHelp?

Yes, please do so.

7. Once items have been exported, staff should wait a day before adding the item(s) to circulation?

Yes. Library staff make the lists and then the next morning or when they're able to, catalogers upload the records into CARL. Catalogers want to give staff a full day of working on the lists in order to upload it. It's better if it's done during off hours so that the catalogers aren't interfering with anything while staff are working on it. The turnaround is usually less than 24 hours.

8. There is an option to have OCLC numbers added to order bibs for Ingram and Midwest Tape. Would this be helpful or make things messier?

If the vendors will do this, then yes, this would be helpful. There are things that can be done for syncing those records in OCLC and getting updates for them. Please go ahead then and ask them to make that change.

9. When can staff start using OCLC?

Staff can start right away using OCLC! SkyRiver will be gone fairly soon, so please start using this and get comfortable with it. And if anyone has question, please don't hesitate to email them.

10. When entering an item, and it is a different edition, or different publisher, do you prefer we send a CAT request or use OCLC?

If it is a different edition or publisher, please send a Cat Request so the right information can be entered in. If a patron needs it right away, expedite it, otherwise you may have to wait a little bit.