
CATALOGING: THE BASICS FOR CCC LIBRARIES

The basic process of cataloging print materials in Alma and Connexion, working with the CCCL Network Zone, and a few other introductory cataloging details.



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TODAY'S TOPICS

- Cataloging Policies and Best Practices | Mary Wahl and Stephanie Roach
 - Working in the Network Zone | Mary Wahl and Stephanie Roach
 - Cataloging Single Print Title | Cheryl Cruse
 - Management Tags
 - Publishing of Records to OCLC
 - Withdraw Holdings of Single Titles
 - Cataloging in Connexion | Glorian Sipman
 - Import of Single Bib | Direct Export via OCLC Gateway
 - Import File of Bibs using Import Repository Profile
 - Upcoming Cataloging Office Hours & Wednesday Webinar Topics
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POLICIES & BEST PRACTICES

Cataloging in the context of the Network Zone: [The Cataloging Workgroup Wiki](#)

- Bibliographic Records in the NZ (Policy)
 - Cataloging at the WorldCat Level (Policy)
 - Exceptions to Bibliographic Records in the NZ (Best Practice)
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WORKING IN THE NETWORK ZONE

Bibliographic records from your Institution Zone are linked to the shared Network Zone (with exceptions).

Guiding principles:

- Each record needs an OCLC number
- 035\$a is the match point in NZ
- Avoid duplicate records
- NZ records needing (non-local data) changes should be made directly in WorldCat

The screenshot shows the WorldCat interface with the 'Institution' tab selected. A search result is displayed for 'The power of patience : how to slow the rush and enjoy more happiness, success, and mind every day / M.J. Ryan.' The record details include: Book (Book - Physical) text; unmediated; volume By Ryan, M. J. (New York : Broadway Books, 2003.); Subject: Patience; Creation Date: 11/26/2019 5:12 AM; Modification Date: 11/01/2020 5:50 AM; Edition: 1st ed.; Language: English; ISBN: 0767914864 and others; Record number: (OCoLC)51178154. Below the details is a table of holdings for the physical format.

| Library | Location | Call Number | Accession Number |
|---------|----------|-----------------------|------------------|
| Skyline | SKYCIRC | BJ1533.P3 R93 2003 | - |

WORKING IN THE NETWORK ZONE

A note about **exceptions**...

- Equipment records for inventory control
- Records for externally owned resources (instructor reserve copies, ILL)
- On the fly or other temporary records
- Bibliographic records without an OCLC number in 035\$a
- Etc.

Unlink these records from the Network Zone.

The screenshot shows a library catalog interface with three tabs: 'Institution', 'Network' (highlighted with a red box), and 'Community'. Below the tabs are options for 'Select All', 'Sort by: Rank', and 'Secondary Sort by: Rank'. A list of records is shown, with the first record highlighted by a red box. The record is titled 'The power of patience : how to slow the rush and enjoy more happiness, s mind every day / M.J. Ryan.' and includes details such as 'Book {Book - Physical} text; unmediated; volume By Ryan, M. J. (New York : Broadway Books, 2003.)', 'Subject: Patience.', 'Edition: 1st ed.', 'Creation Date: 11/11/2019 9:23 AM', and 'Modification Date: 11/01/2020 5:50 AM'. To the right, the ISBN and Record number (OCOLC)51178154 are displayed. Below the record, a section titled 'Held by (4)' (highlighted with a red box) lists the following institutions: 'My Institution' (highlighted with a red box), 'Glendale Community College', 'Los Angeles Co College District', and 'State Center Community College District Libraries'. A link for 'Other details' is located at the bottom of the record entry.

BIB RECORDS IN NZ: EACH RECORD NEEDS AN OCLC NUMBER

Why are OCLC numbers needed? OCLC number is the record match point.

Find records without OCLC number AND linked to NZ

IZ Advanced Search:
Physical or All Titles

- OCLC Control Number (035a): Is Empty
- Linked institution = Network
- Is linked = Yes

Search in: **Physical titles** ▾ Zone: **Institution** Network Community

| | | | |
|--|------------------------------------|-----------------|------------------------|
| Title: OCLC Control Number (035a) ▾ | Is Empty ▾ | | + □ × |
| AND OR | Title: Linked Institution ▾ | Equals ▾ | Network ▾ + □ × |
| AND OR | Title: Is linked ▾ | Equals ▾ | Yes ▾ + □ × |

[Clear form](#) [Search](#)

EXAMINE YOUR RESULTS & DECIDE HOW TO PROCEED

How many did you find? Is there a pattern?

- What type of records are they? Reserves, equipment, other?
- Are they attributed to a certain campus, library, or user(s)?

Potential follow up:

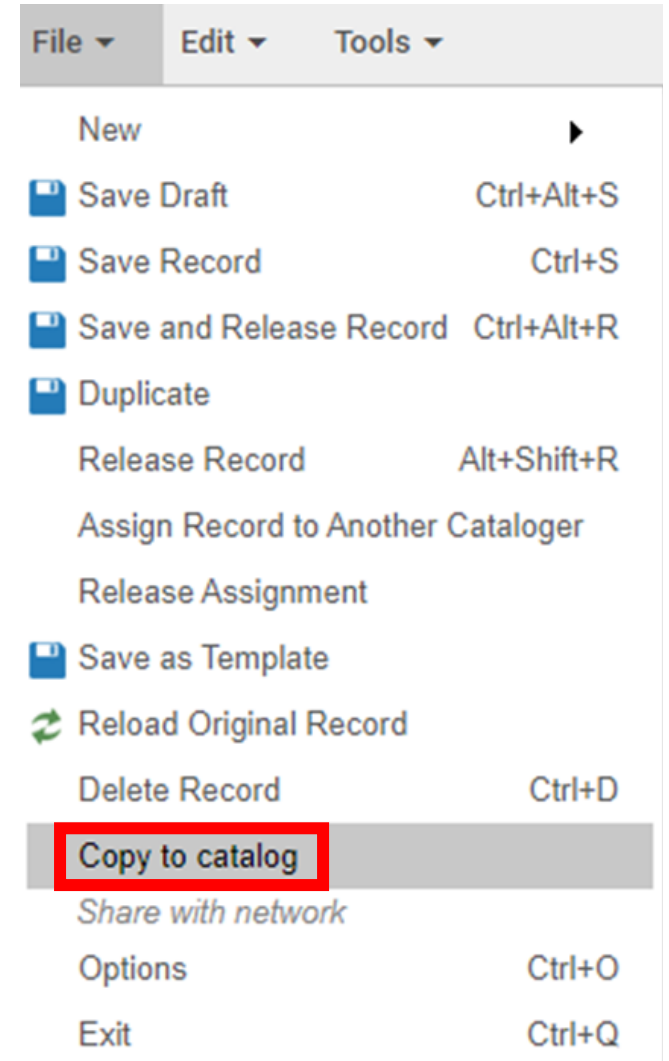
- User settings for default save option – Choose Local
(**Old MDE** / File / Options; **New MDE** / New / Placement options)
 - [Configure default parameter central_record_management](#)
 - Update local policy, procedure, practice, and/or documentation
 - Send reminder to local team, review how-to or offer training to impacted users
-



BIB RECORDS IN NZ: NO OCLC NUMBER? – UNLINK A SINGLE RECORD

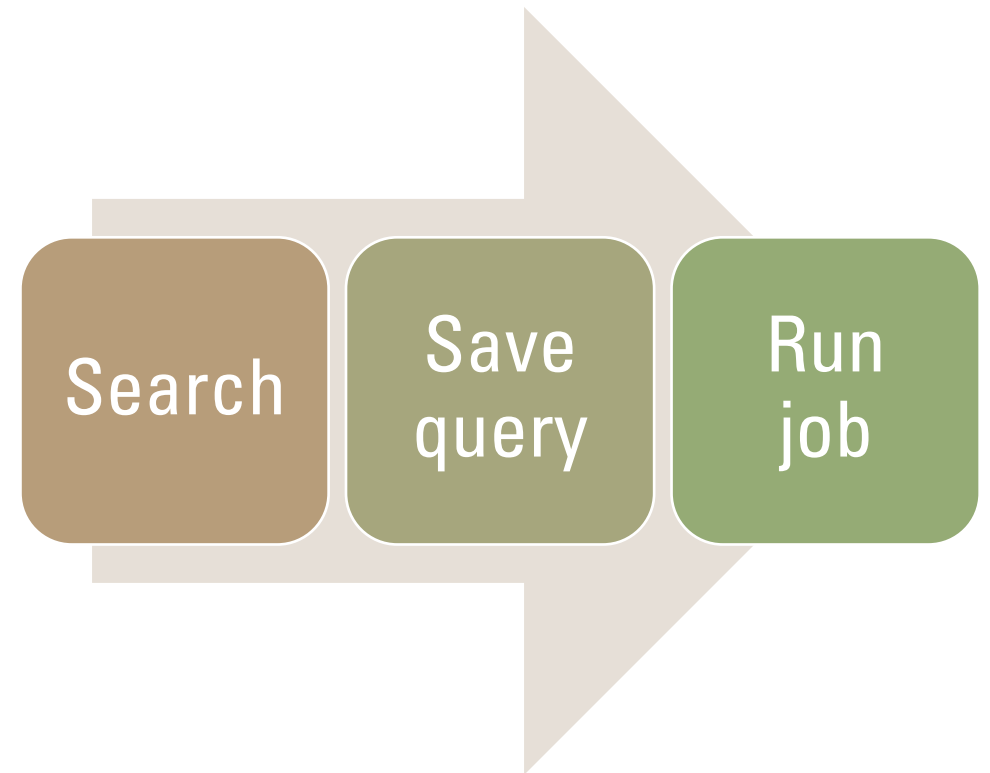
- From Alma NZ search, click on record title
- Click **Edit** (opens the record in Metadata Editor)
- Click **File (or Record Actions) > Copy to catalog**
- Click **File (or Save) > Save and Release Record**

Terms in parentheses refer to the new Metadata Editor



BIB RECORDS IN NZ: NO OCLC NUMBER? – UNLINK A SET OF RECORDS

- **Search for records without OCLC number** using search criteria in slide 7 "Bib Records in NZ"
- Select **Save Query** to create a logical set (follow prompts to name the set, etc.)
- Go to **Admin > Run a Job**
 - Locate and select a job called **Unlink a set of records from the Network**, click **Next**
 - Locate and select **your set**, click **Next**
 - Review and confirm **your parameters**, click **Submit**



YOUR INSTITUTION IS UNIQUE

- Consider your local needs
- Reach out for support, ask questions

Lists: [LSP-ALL](#), [ALMA-L](#), [CAL-RUG](#)

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CATALOGING A SINGLE PRINT TITLE

- Search NZ first for matching record.
- Click Edit to edit record in Metadata editor. Note: Metadata Editor changed May 2020
- Can search for multiple and set aside "Push to MDE" to work on after locating.

The screenshot shows the top navigation bar with 'Institution', 'Network', and 'Community' tabs. The 'Network' tab is circled in red. Below the navigation bar, there are search filters: 'Select All', 'Sort by: Rank', and 'Secondary Sort by: Rank'. The record list shows one item: 'Five came back : a story of Hollywood and the Second World War / Mark Harris.' with an 'Edit Record' button. The record details include: 'Book (Book - Physical) text; unmediated; volume By Harris, Mark, (New York : The Penguin Press, 2014.)', 'ISBN: 9781594204302 and others', 'Language: English', 'MMS ID: 9910006188405261', 'Record number: (OCoLC)852221837', 'Creation Date: 11/11/2019 09:49:54 PST', and 'Modification Date: 10/31/2020 21:59:43 PDT'. At the bottom, there are tabs for 'Electronic', 'Digital', 'Held by (20)', and 'Other details'.

The screenshot shows a blue action menu bar with icons for location, user, checklist, help, refresh, and window. Below the bar are buttons for 'Copy', 'Link', 'Push to MDE', 'Back', and 'Edit'. The 'Push to MDE' button is circled in red. Below the buttons is a light blue bar with a right-pointing arrow.

All titles ▾

Title ▾

Records ▾

DC

MARC21 Bib **2**

KORMARC Bib

UNIMARC Bib

Holdings



Search in list



Save ▾



New



Open Record



Record Actions



Editing Actions



Add Inventory



View Related Data



Order

Lafayette in the somewh... (9910005851305261)

Pushed

Shirley Jackson : a rather... (9910008629005261)

Pushed

Lafayette in the somewhat United States / Sarah Vowell. (9910005851305261)

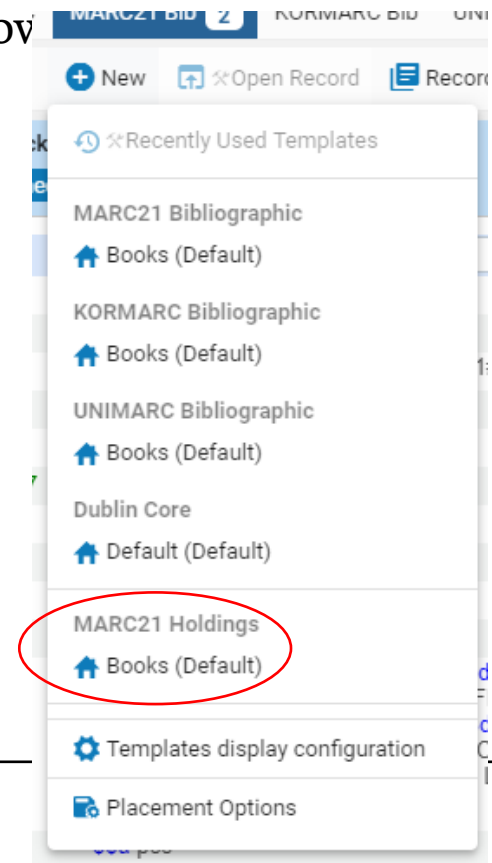
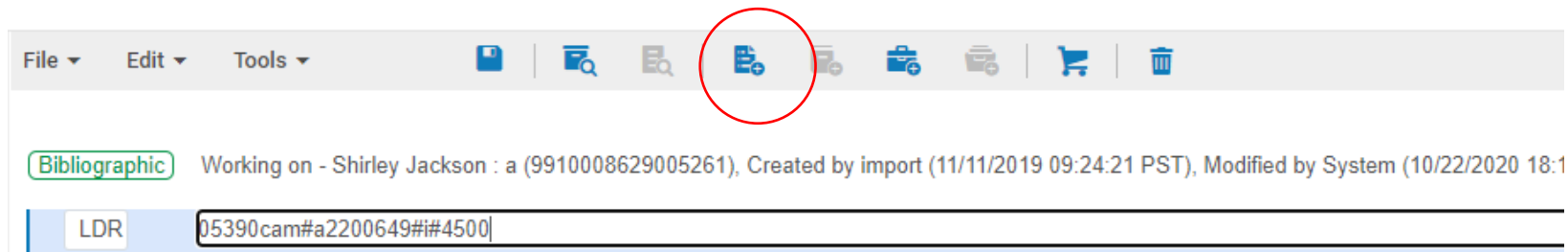
Pushed

MARC21 Bib

| | |
|-------|--|
| LDR | 04607cam#a2200781#i#4500 |
| 001 | 9910005851305261 |
| 005 | 20201021085616.4 |
| 008 | 150710s2015#####nyua#####b#####000#0beng## |
| 010 | \$\$a ##2015024639 |
| 015 | \$\$a GBB5E5258 \$\$2 bnb |
| 016 7 | \$\$a 017570396 \$\$2 Uk |
| 019 | \$\$a 919591037 \$\$a 927382958 |
| 020 | \$\$a 9781594631740 \$\$q (hardcover) |
| 020 | \$\$a 1594631743 \$\$q (hardcover) |
| 020 | \$\$a 9780399573101 \$\$q (softcover) |
| 020 | \$\$a 0399573100 \$\$q (softcover) |
| 024 8 | \$\$a 40025398573 |
| 035 | \$\$a (OCoLC)900623786 \$\$z (OCoLC)919591037 \$\$z (OCoLC)927382958 |

Record found in NZ:

- Click Edit to begin editing record
- Edit / Add Local Extensions for local notes OR Ctl-L
- Click **Add holdings** if in Old Metadata Editor
- Do not make any changes, except adding Local Notes (AKA Local Extension), to NZ record
- In new MDE click New / Marc21 Holdings – may have to add new template below











New MDE:

New

Turn on Marc21Bib (or one you need) in Templates in Display Configuration

New / Template will display

ates display configuration

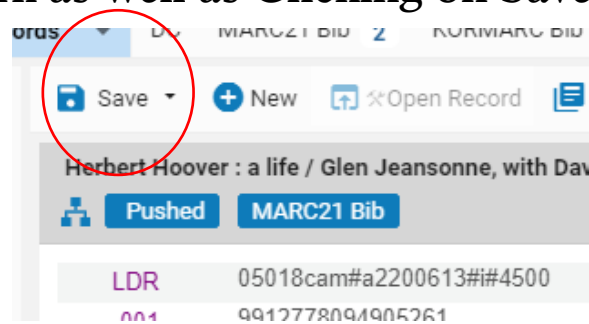
| Template Format | Template Name | Template Scope | Template Type | Template Status | Display in Menu |
|-----------------|-------------------|---|---------------|---|-------------------------------------|
| DC | Default (Default) |  | Shared |  | <input checked="" type="checkbox"/> |
| DC | Default (Default) |  | Shared |  | <input checked="" type="checkbox"/> |
| MARC21 Bib | Books (Default) |  | Shared |  | <input checked="" type="checkbox"/> |
| MARC21 Bib | Books (Default) |  | Shared |  | <input checked="" type="checkbox"/> |

- **OLD Metadata Editor:**

- In holdings 852 area, CTL-F opens form editor.
- Select location and Shelving location.
- Ctl-S saves the holdings record.
- Alt-I opens item record form. Enter information.
- Release or Save and Release record.

- **NEW Metadata Editor:**

- New / Marc21Holdings – opens holdings template - Ctl-F opens form
- Add Item OR Alt-I to add item record
- Ctl-S – *may* not work as well as Clicking on Save in menu works better than Ctl-S



SET MANAGEMENT TAGS

- Exports bib records to OCLC
 - Don't publish – select this if you have brief bibs that don't belong in OCLC
 - Publish Bib – select to notify OCLC of inventory on that title
 - Publish Holdings Only – for serials – when you want OCLC to have coverage, shelving loc, volumes
 - Note: Set up Publishing Bib Records to OCLC to automate this process
 - See Israel Yanez's instructions: [*Publishing Bib Records to OCLC*](#)
-

Set Management Tags in Old Metadata Editor

Tools: Set Management Tags

The screenshot displays the 'Tools' menu in the Old Metadata Editor. The 'Set Management Tags' option is selected, opening a sub-menu with the following items:

- Suppress from Discovery
- Suppress from external search
- Export to WorldCat ▶
- Force export to WorldCat
- Brief Level 10

A secondary sub-menu is open for 'Export to WorldCat', containing:

- Don't publish
- Publish holdings only
- Publish bib

The background shows a list of records with MARC tags such as XCP, BDX, BIC, IA, GK8, OCLCF, MEA, ZHB, OO3, NUI, IGA, GL3, CHVBK, TXWBR, KSU, OCLCO, NZHSD, TYC, OCLCQ, CD5, T7X, B@L, CSA, TXSCH, UAT, FSS, FB3, LWA, ILM, OCLCQ, GILDS, NJB, OCLCQ, OCLCO, OCLCQ, OCLCO, EYB, FQG, SPP, CRU, OCLCQ, CPS, OCLCQ, OCLCO, NJR, BUB, ALV, JDP, KI2, VAN, TOF, CUY, N, AZU, LKC, DKC.

Other visible menu items include: View Notes, View Collections, Release All Records for User, Test external records, MARC Bibliographic (with sub-items MARC21 Holdings and Dublin Core), and Linked Data.

Set Management Tags in New Metadata Editor

Record Actions

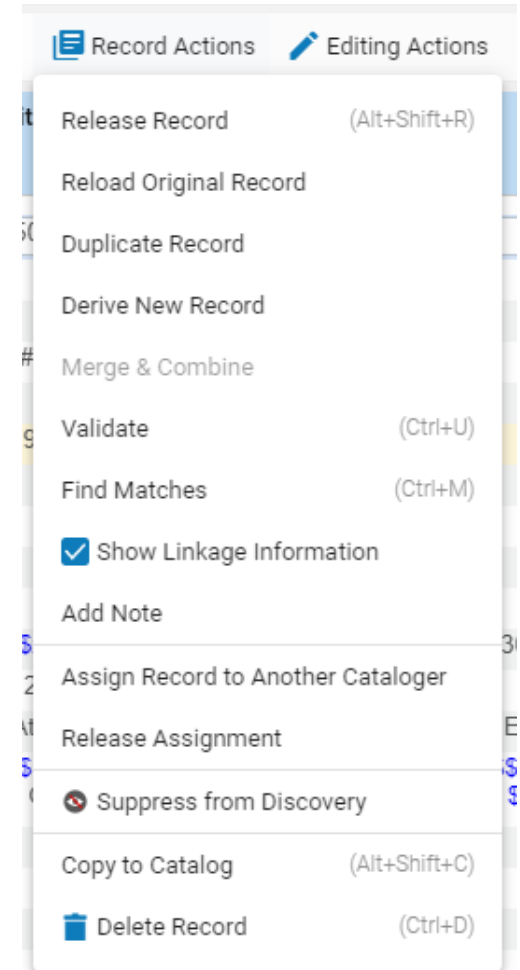
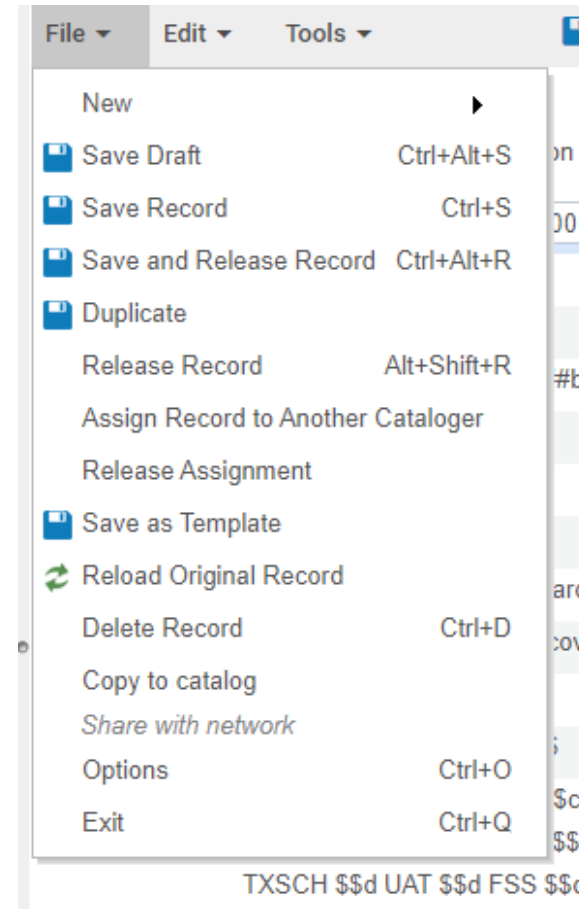
The screenshot shows the 'Record Actions' menu in the New Metadata Editor. The menu is open, and the 'Set Management Tags' option is selected, which has opened a sub-menu. The sub-menu contains the following options:

- Export to WorldCat
- Force Export to WorldCat
- Don't Publish
- Publish Holdings Only
- Publish Bib

The background shows a list of records with various metadata fields, including call numbers and subject terms. The 'Set Management Tags' option is highlighted in the main menu, and the sub-menu is positioned over the right side of the record list.

WITHDRAW HOLDINGS

- Old MDE:
 - Select File / Copy to Catalog / Delete Record
- New MDE: Record Actions / Copy to Catalog /
- Delete record



Deleting holdings in Alma from within Item Record:

- Search for title in Alma.
- Click on Item record info.
- Click on Item / Click ellipses / Withdraw to withdraw item from catalog
- Options for deleting holdings only and bib if no holdings remain

1 **Shirley Jackson : a rather haunted life / Ruth Franklin.** [Edit Record](#)

Book (Book - Physical) text; unmediated; volume By Franklin, Ruth, (New York : Liveright Publishing Corporation, a division of W.W. Norton & Company, [2016]) **Language:** English **MMS ID:** 991000991106205272

Subject: Women authors--Biography. Authors, American--20th century--Biography. BIOGRAPHY & AUTOBIOGRAPHY--Literary. and others **ISBN:** 9780871403131 and others **Record number:** (OCoLC)937452606

Creation Date: 10/29/2020 09:25:49 PDT

Modification Date: 10/29/2020 09:43:39 PDT

Edition: First edition.

Physical (2) Electronic Digital [Other details](#)

Shirley Jackson : a rather haunted life / Ruth Franklin. Franklin, Ruth, author. Liveright Publishing Corporation, a division of W.W. Norton & Company, New York : 2016 [0871403137] [View all holdings](#)

Location Redding Campus: Main Stacks; PS3519.A392 ... **MMS ID** 991000991106205272

1 - 1 of 1 Call number Sort routine 0 rows selected Manage Selected Add Item

Status : All Year : All Volume : All Description : All Receive Date : All

| | <input type="checkbox"/> | Barcode | Library | Location | Call Number | Item Call Number | Year | Volume | Description | Temporary Location | Status | Process type | Access Number | Receiving date | |
|---|--------------------------|---------|----------------|--------------------|----------------------|----------------------|------|--------|-------------|--------------------|---------------|--------------|---------------|----------------|--|
| 1 | <input type="checkbox"/> | 978087 | Redding Campus | Techni... Services | PS3519.A392 Z64 2016 | PS3519.A392 Z64 2016 | - | - | - | Yes | Item in place | - | - | - | |

PUBLISHING BIB RECORDS TO OCLC

- Israel Yanez of Los Rios and CSU Sacramento has re-written instructions.
 - *[Publishing Bibliographic Records to OCLC document](#)*
- Job that can be set up and run daily to update holdings in OCLC.



CHECKING ON THE PUBLISH HOLDINGS TO OCLC JOB – HOW DO YOU KNOW IT RAN?

- Monitor if job ran:
 - Admin / Monitor Jobs / History
 - Should see the number of records updated.
 - Pick a few titles that should have published to OCLC.
 - Log on to Connexion client.
 - Look up title by OCLC number or ISBN
 - If it says ...Holdings in ...(3letterOCLCcode) then you know job ran



CATALOGING IN CONNEXION

- Use Connexion client to catalog
 - When no copies of title are found in NZ
 - Original cataloging
 - See: [CCL Alma Cataloging Basics document](#)

Two Options (demonstrated by Glorian Sipman, MiraCosta College)

- Direct Import of a Record from Connexion into Alma using the [OCLC Gateway](#)
 - Importing a Batch of Records from Connexion into Alma using an [Import Profile](#)
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UPCOMING CATALOGING TOPICS



- Editing display of "illegal aliens" subject headings in Primo VE
- Electronic resource cataloging
- Post-reclamation tasks – if needed

SOURCES

- [CCL Alma Cataloging Basics](#) - LSP Cataloging Workgroup
 - [CCCL Wiki – Cataloging](#)
 - [Publishing to OCLC](#) – by Israel Yanez
 - [SUNY Library Consortium Guides](#)
 - [Importing Records from Connexion \(via OCLC Gateway\) Set Up Instructions](#) - ExLibris
 - [Import Repository Profile for Loading Bibs from Connexion](#) - LSP Cataloging Workgroup
-