



SHARE

OCLC Basics

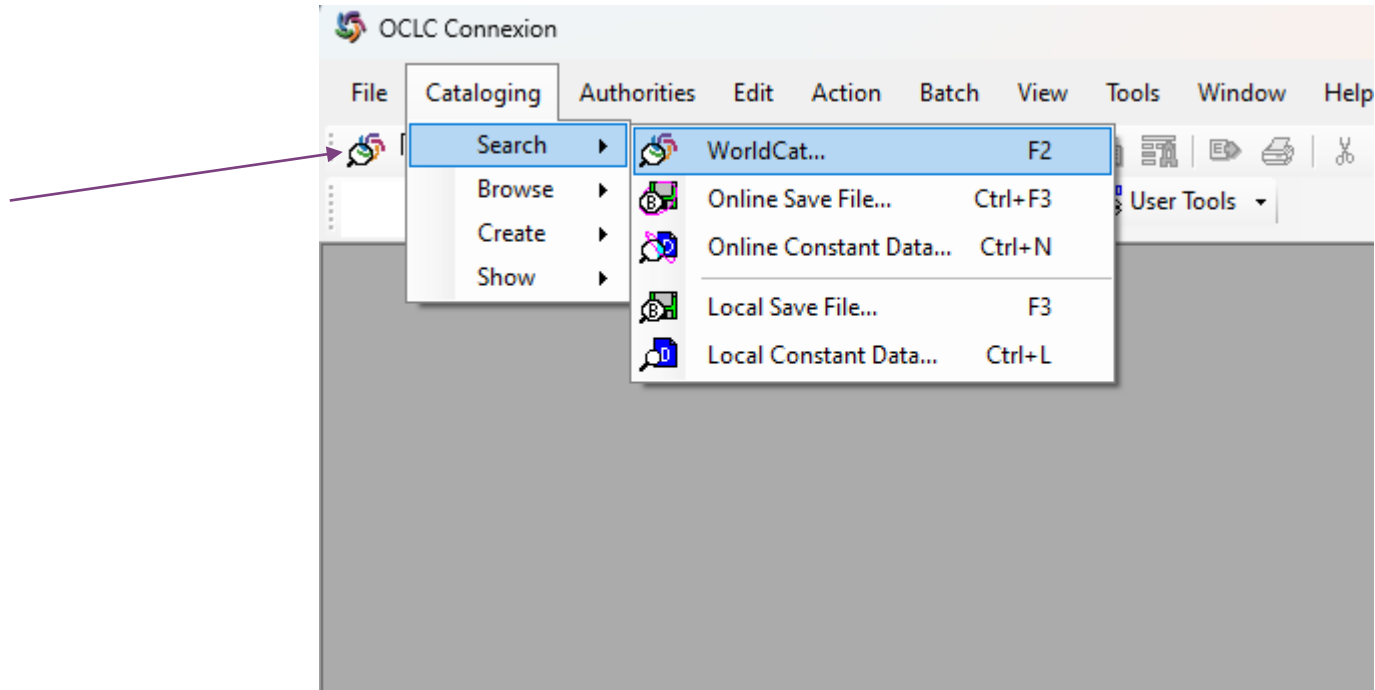
SHARE Catalogers

Catalogers Training Session – August 8, 2023

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Searching WorldCat



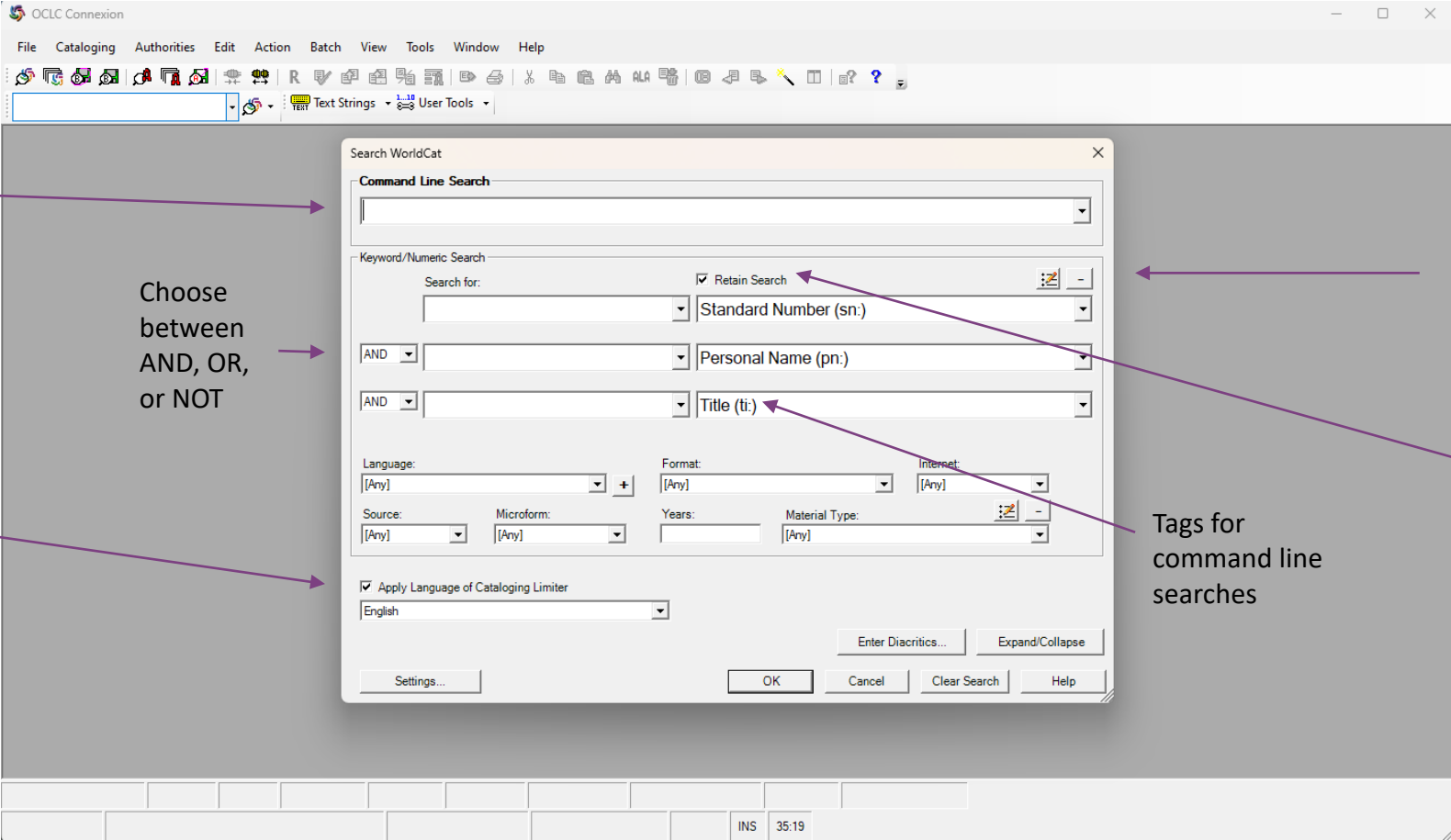
Searching WorldCat from the cataloging drop-down menu OR
the icon for searching WorldCat (see arrow)

Searching WorldCat

Box for command line searches (begin with tags)

Choose between AND, OR, or NOT

Language of cataloging limiter: set to English for IHLS

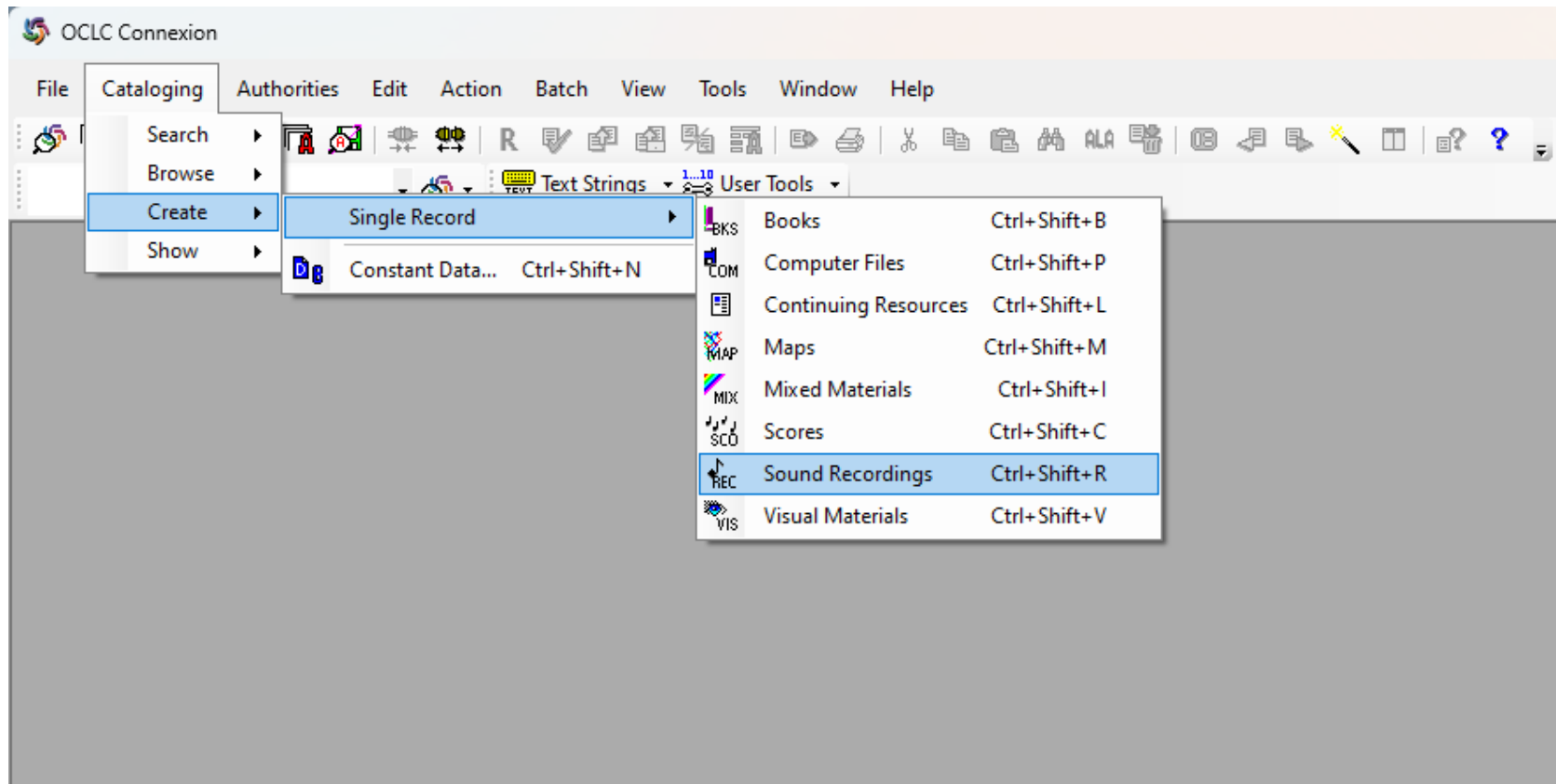


Plus or minus sign to add/delete search options

Click retain search if you want your search parameters to stick around

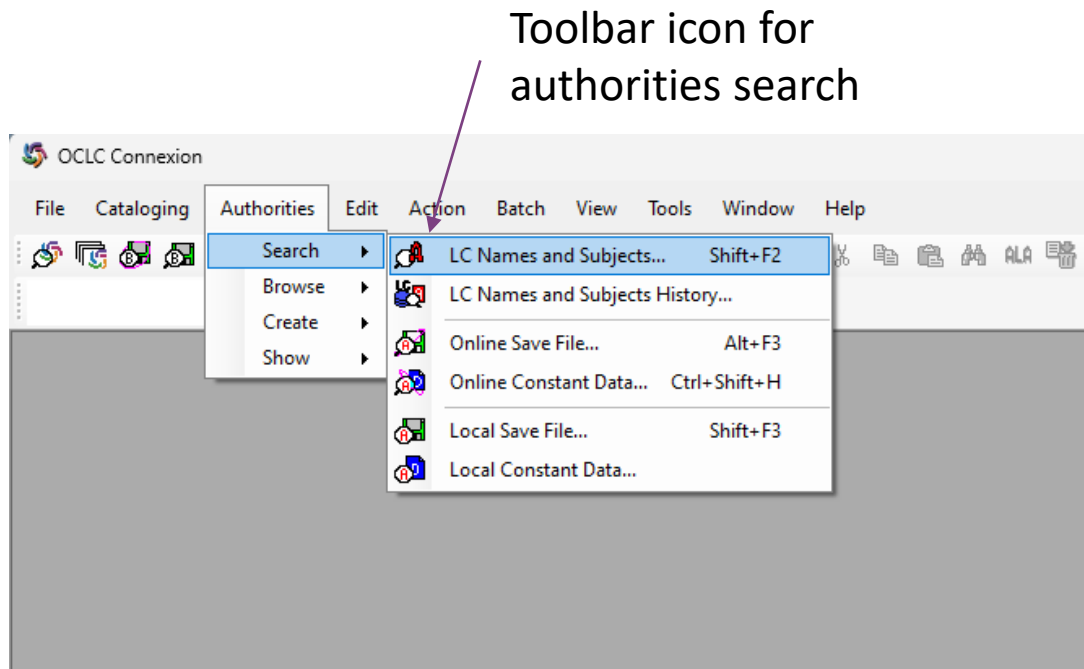
Tags for command line searches

Creating new records



Keyboard shortcuts for creating each type of record can be seen to the right on the drop-down menu

Searching Authority Records



- Magnifying glass with an A or Shift + F2 for searching LC Names and Subjects
- Important to search the authority records for all access points that you're adding or checking for a bibliographic record!

Searching Authority Records

Command line search bar (use tags)

Search LC Names and Subjects

Command Line Search

Enter keyword, numeric, derived, or browse search here...

Keyword/Numeric Search

Search for:

in Corporate/Conference Nam

OR in LCSH (su:)

OR in Genre (ge:)

OR in Personal Names (pn:)

OR in Titles (ti:)

Show See References in Results

Show See Also References in Results

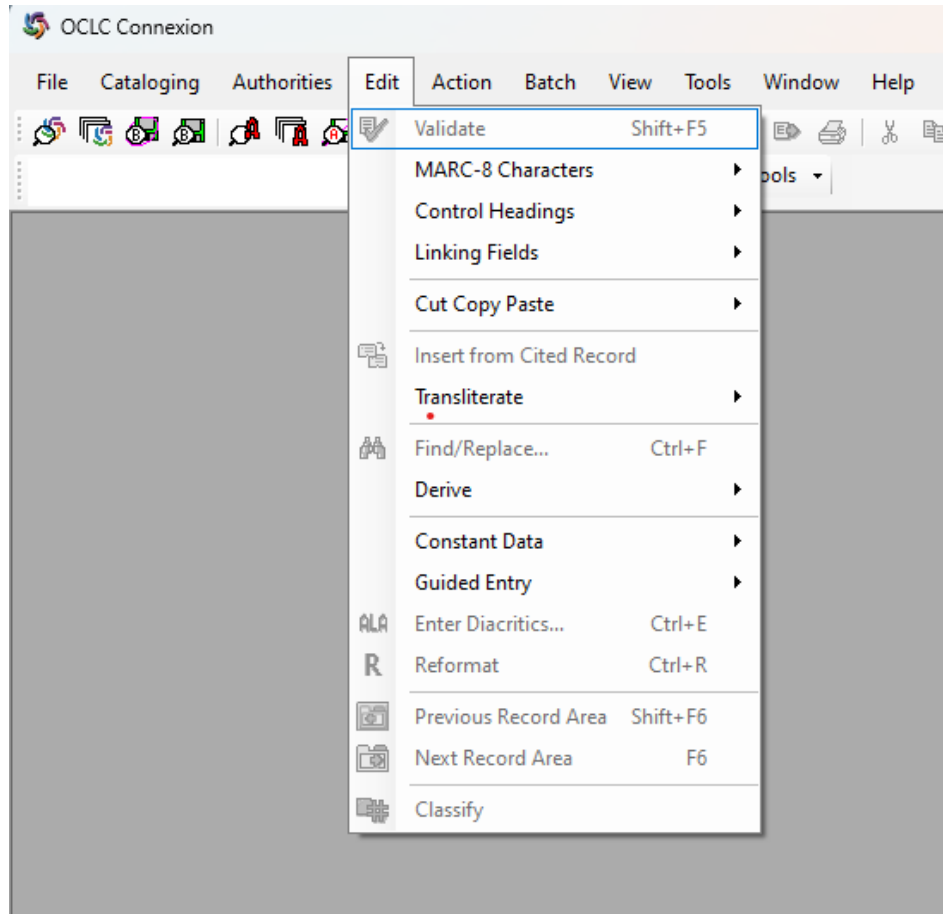
Retain Search

OK Cancel Enter Diacritics... Clear Search Help

Tags for command line searches. Click drop down menus to see more options for authority searches

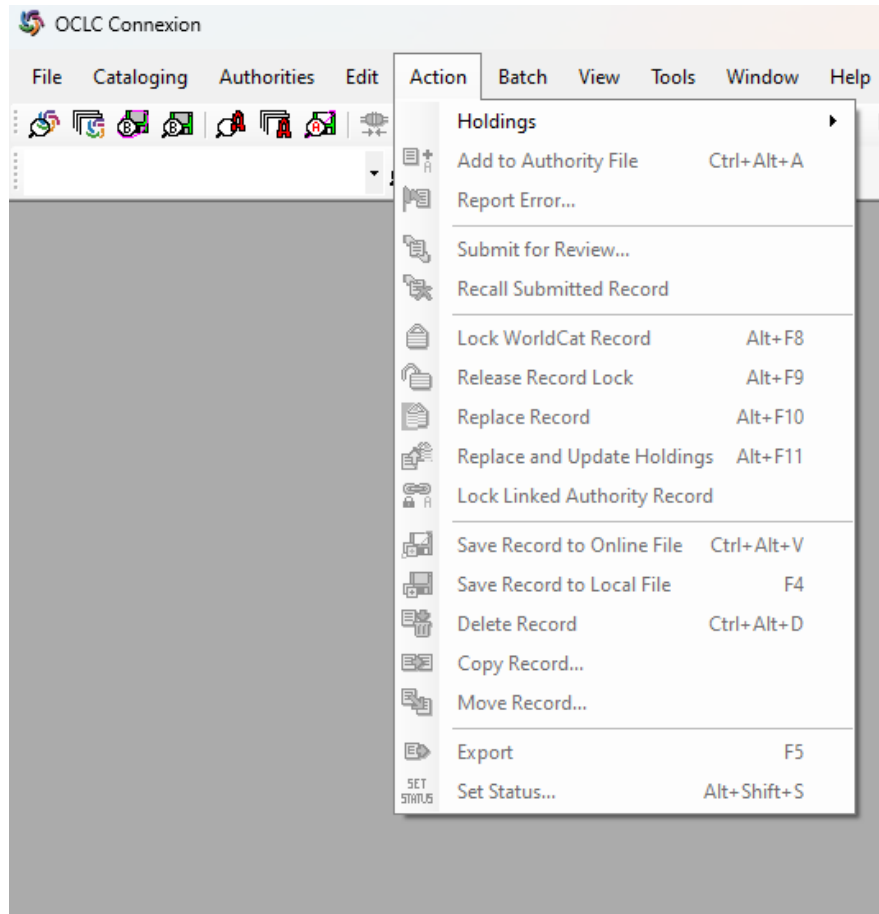
Retain search option

Edit Menu



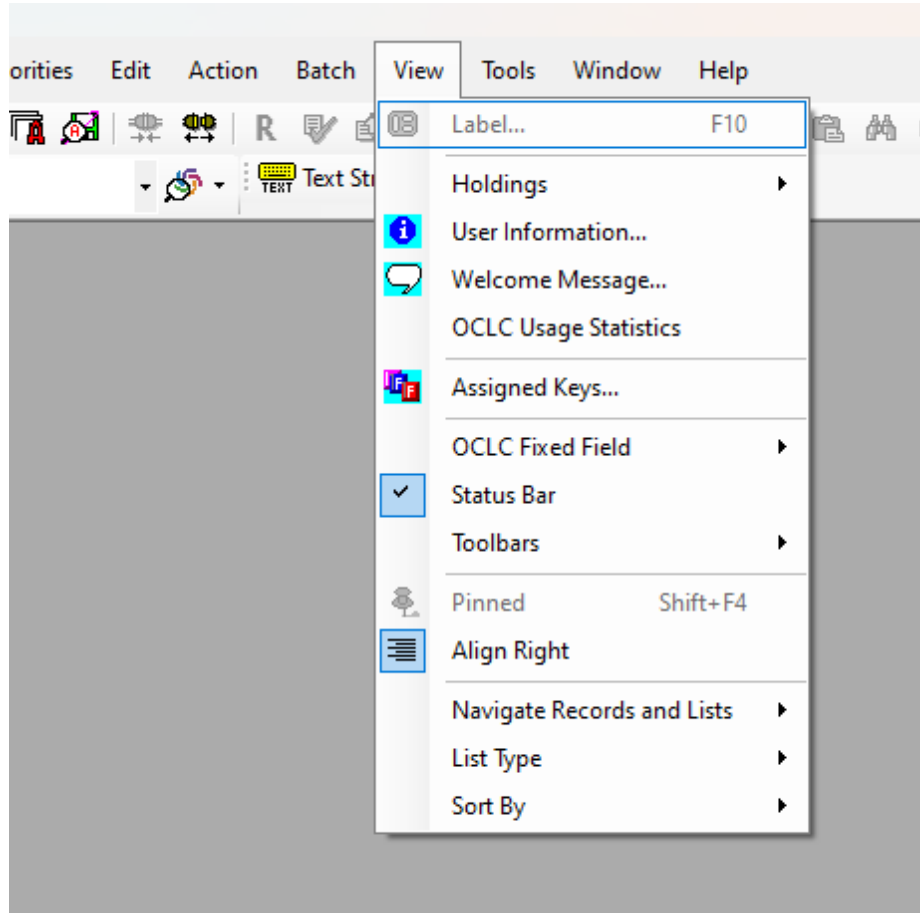
- Validate or Reformat records (validating also automatically reformats)
- Derive new WorldCat records from the record you're in
- Constant data
- Guided entry for 006 fields
- Control headings from the drop-down menu or F11

Action Menu



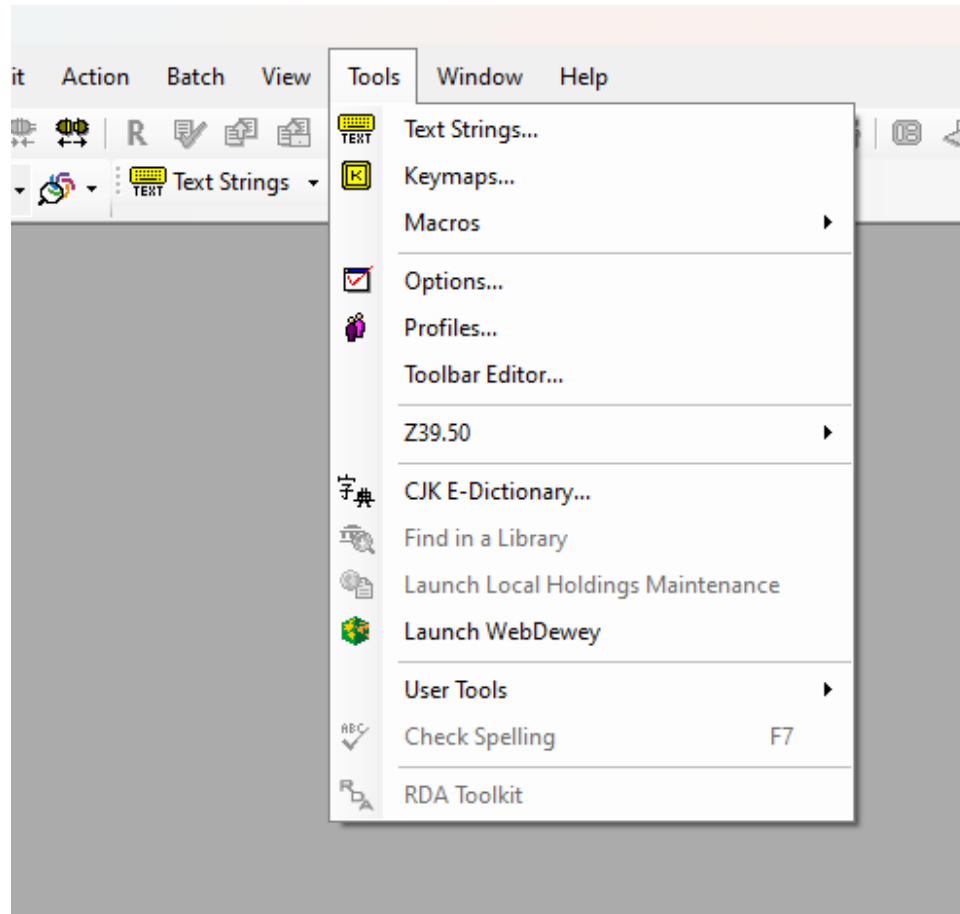
- Lock record: lock while you are editing the master record
- Replace record: for changes to the master record
- Save to the online or local save files
- Export records for importing to Polaris (F5)

View Menu



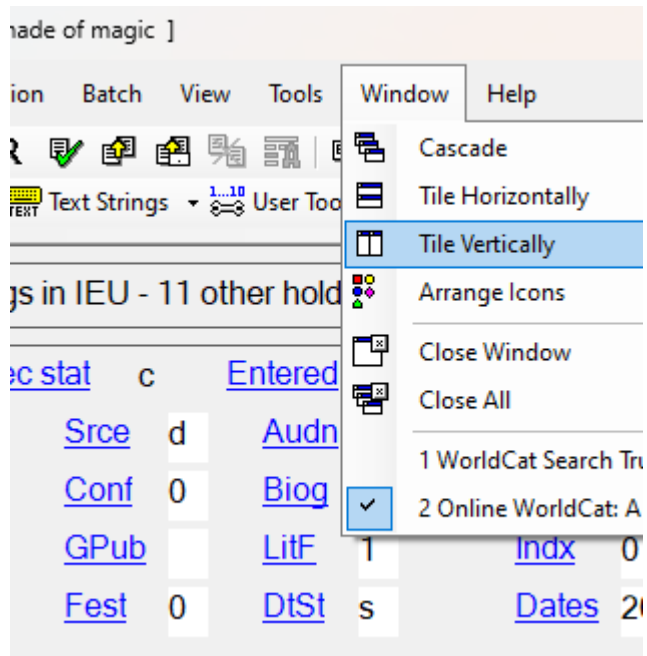
- List type: change from truncated to brief in searches if you want more/less information if your search results list
- Pinning is useful if you want to see multiple screens when editing

Tool Menu



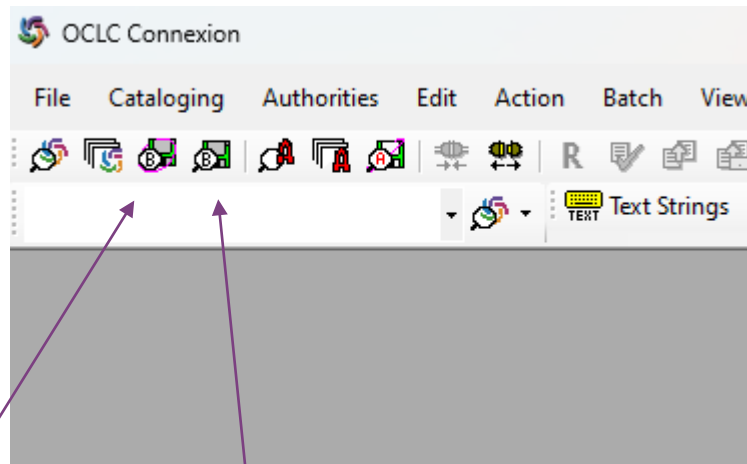
- Text string editor
- Keymap editor
- Macros
- Spell check (very useful!)
- RDA toolkit – this would need to be hooked up with your specific authorizations in order to work. It's probably just easier to go to the toolkit separately and login there

Window menu



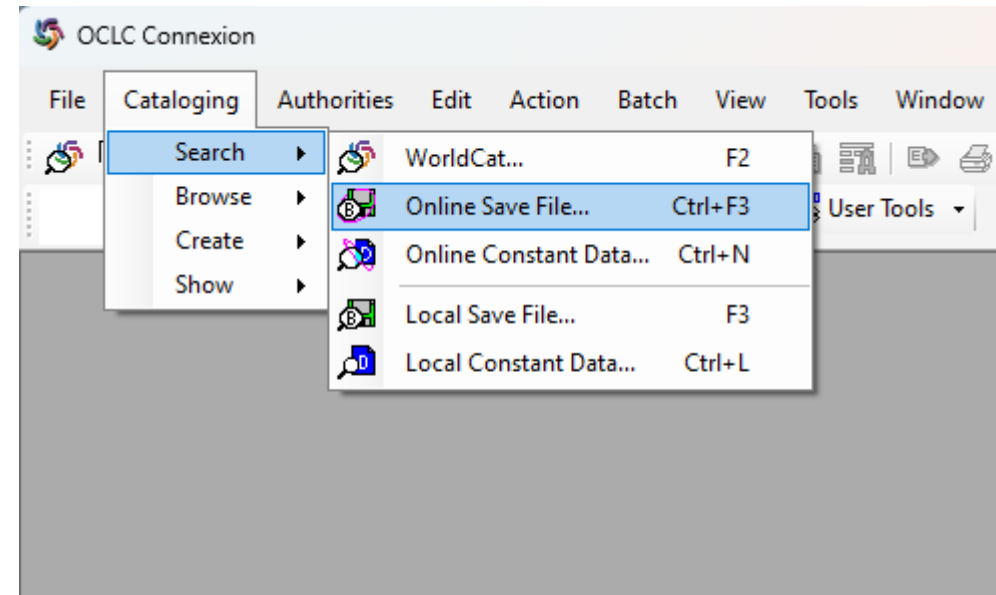
- Pin records (View > Pinned, or Shift + F4) if you want to tile multiple records and see them at the same time. Otherwise, tiling will work for whichever screens you have open at the time, including search results screens

Accessing the save files



Search online
save file

Search local
save file



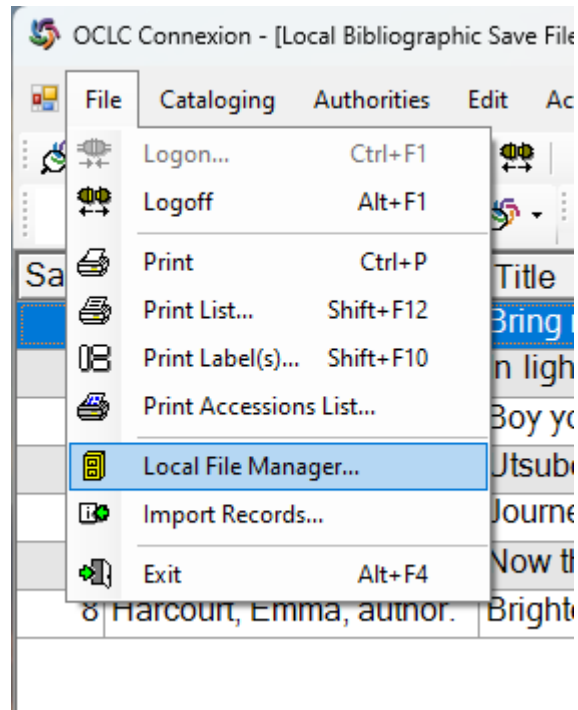
Drop-down menu with function key info for
searching the online or local save files.

Accessing the save files

The screenshot shows a dialog box titled "Search Local Bibliographic Save File". At the top, there is a "Local File:" field containing the path "C:\Users\lawiegand\AppData\Roaming\OCLC\Connex\Db\DefaultBib.bib.db". Below this, a message reads "Search for all records by not specifying any criteria." The search interface includes several rows of criteria: "Search for:" followed by an empty dropdown and "in Save File Number"; "OR" followed by an empty dropdown and "in My Status"; "with: Workflow Status" followed by an empty dropdown; "OR" followed by "Action Status" and an empty dropdown; and "OR" followed by "Source Status" and an empty dropdown. At the bottom left, a "Limit Search by" section contains checkboxes for "Held" and "Not Held", a "Date:" field, and a "Library:" dropdown set to "[Any]". A "Format:" dropdown is also set to "[Any]". To the right, a "Retrieval Order:" dropdown is set to "Save File Number", and there is a "Retain Search" checkbox. On the far right, there are buttons for "Enter Diacritics...", "Clear Search", "OK", "Cancel", and "Help".

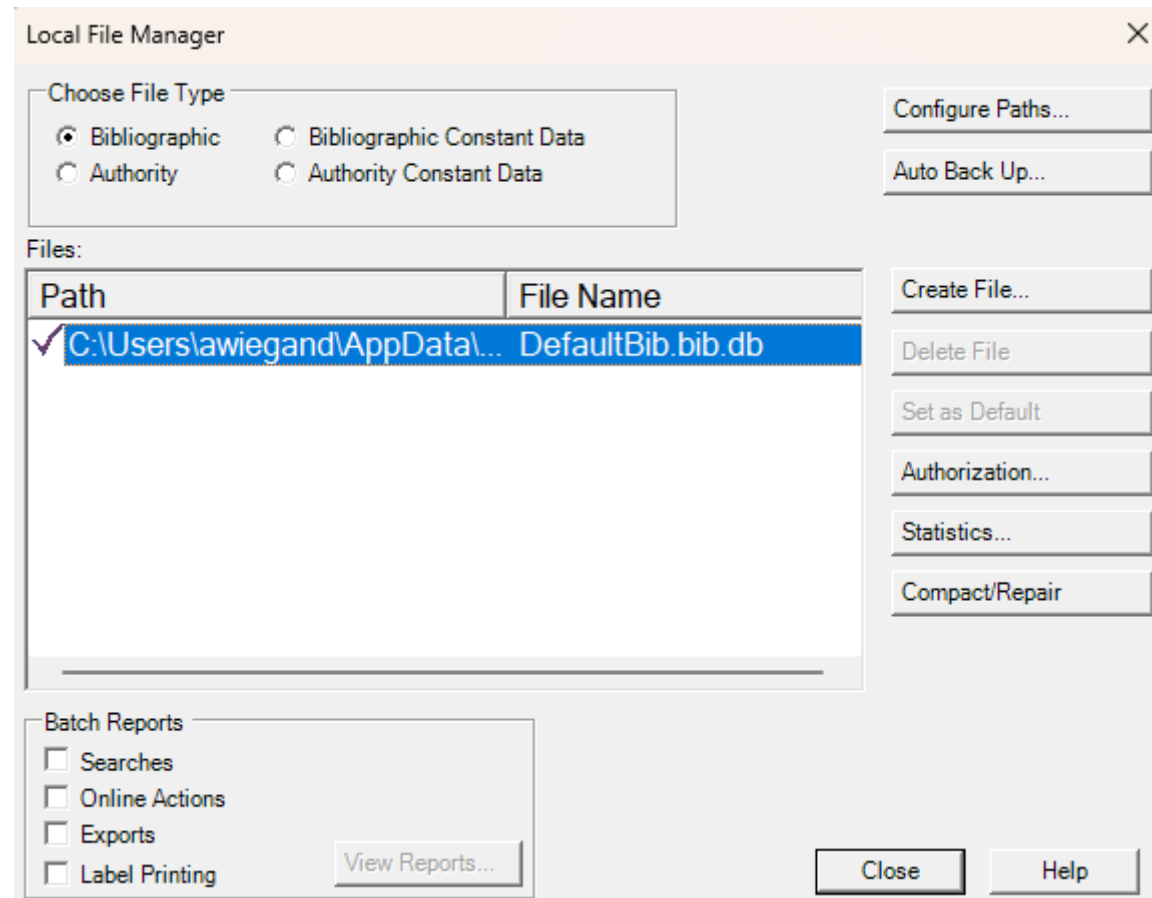
It will ask you for a file number. You can put in a specific file number, and it will take you straight there, or you can just hit “enter” without filling in any information, and it will take you to a list of your saved files. This works the same way for both the online and local save files.

Repairing Records



- You might come across files in your save file that won't allow you to access or delete them. It might say that you're "already editing" them. This can easily be fixed.
- After selecting the problem file, go to File > Local file manager. Then hit the compact/repair button.

Repairing records



Links for working in OCLC

- Default function keys

[Default function keys - OCLC Support](#)

- OCLC quick reference guide

[Quick reference: Cataloging in Connexion client - OCLC Support](#)