

# Oregon Library Association 2009 Conference

## Maximizing the Value of Your OCLC Cataloging Subscription

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### Agenda

- Definition of cataloging subscription
- Services included in cataloging or CatExpress subscription
- Opportunities to earn credits
- Tips and tricks
- Statistical reports
- Training

### Definition of cataloging subscription

- Full cataloging subscription: If you use Connexion client or Connexion browser (with Cataloging and Authorities tabs), you have a full cataloging subscription. Your invoice will have a product code beginning with FIX.
- CatExpress subscription: If only the Express and General tabs are available in Connexion browser, you have a CatExpress subscription. Your invoice will have a product code beginning with CXP.

### Interface choices

- Full cataloging subscription:
  - Connexion client
  - Connexion browser
  - CatExpress
  - Z39.50
- CatExpress subscription: CatExpress only

## Services included in subscription

Service	Full cataloging subscription	CatExpress subscription	Comments
Bibliographic searches	YES	YES	
Bibliographic exports	YES	YES	
Holdings updates	YES	Yes, see comments	CatExpress: subscribe at desired level; pay “excess usage” charge per record at renewal time
Authority searches	YES	Not available	
Authority exports	YES	Not available	
Catalog cards	YES	Not available	
BibNote	YES	YES	Delivers bib record when 505 added/edited or Encoding Level upgraded
WorldCat Cataloging partners (basic level)	YES	YES	Order materials from vendor partner as usual; OCLC sets holdings and sends you bib records
Accessions List	YES	Not available	HTML report at frequency you choose
eSerials holdings	YES	YES	Automatically maintains WorldCat holdings for eSerials
Batchloading: one free retrospective or reclamation project	YES	YES	“Catch up” if you haven’t kept up with holdings maintenance over the years
Batchloading to delete holdings	YES	YES	

### Credits (full cataloging subscription only)

- Original cataloging credit
- Database enrichment credit
- Minimal record upgrade credit
- Online holdings deletion credit

Details: *Bibliographic Formats and Standards*, chapter 5: [www.oclc.org/bibformats](http://www.oclc.org/bibformats)

### Expert Community Experiment

- Allows full-level cataloging authorizations to make additions and changes to **almost** all fields in **almost** all records
- [www.oclc.org/worldcat/catalog/quality/expert/](http://www.oclc.org/worldcat/catalog/quality/expert/)

### Tips & Tricks

- Authorizations
  - Contact OCLC Western (800-854-5753 or [western@oclc.org](mailto:western@oclc.org)) to get a list of your authorizations
  - To make changes, additions, or deletions: Use Access and Authorization form on OCLC forms page: <https://www3.oclc.org/forms>
- Connexion client
  - Store authorization (Tools > Options > Authorizations)
  - Batch holdings deletion (Batch > Holdings by OCLC Number)
  - Set validation level (Tools > Options > General > Validation Level Options)
  - Constant data
  - Text strings
  - Customize screen colors (Tools > Options > Record Display)
  - Customize toolbar (Tools > Toolbar Editor)
- Connexion browser
  - Store authorization (at bottom of logon screen, click Local Browser Settings)
  - Hide tabs you don't use (General > Admin > General Options > Interface Customization Options)
  - Change background color (General > Admin > General Options > Interface Customization Options)
  - Set default views (General > Admin > General Options > Cataloging Options)
  - Set validation level (General > Admin > General Options > Cataloging Options)
  - Set result set size (General > Admin > General Options > Cataloging Options)

### **Efficient searching (Connexion client and Connexion browser)**

- Use **ll:eng** to limit search results to records with English as language of cataloging (that is, the language of the bibliographic description; not the language of the material it describes)
- In Connexion client, to set truncated list to display CatL column: Right-click anywhere in truncated list; choose List Settings
- Material type qualifier
- Date qualifier

### **Tips & Tricks: CatExpress**

- If you have next-day delivery of records, consider changing to same day ([western@oclc.org](mailto:western@oclc.org))
- Set preferences (General > Admin > Express Options)

### **Statistical reports**

- CatExpress: Product Services Web: <http://psw.oclc.org>
- Connexion Browser and Connexion Client: [www.stats.oclc.org](http://www.stats.oclc.org)

*Thanks for coming!*

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