



THE INFORMATION NETWORK FOR OHIO SCHOOLS

## OCLC Record Request Instructions - Complete

<http://www.infohio.org/UCTF/OCLCRecordRequestComplete.doc>

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Bank 20 at the Union Catalog is an OCLC Record Request Bank. It currently contains unfilled requests with an item record for each DASite Bank that has requested that record. Following are instructions that will enable you to add your request to one that already exists OR to generate a request for a record not previously requested. There are 6 parts to the following instructions:

- Part I: Accessing Bank 20, the Union Catalog OCLC Record Request Bank.
- Part II: Finding/Creating a Bibliographic OCLC Request Record and Making a Request
- Part III: Loading a Request Record into Your Bank as a Temporary Circulation Record.
- Part IV: Reading the E-mail Message Reporting the Load of the Request Record.
- Part V: Printing a Branch Report of Unfilled OCLC Requests.
- Part VI: Bank Report of Filled OCLC Records Loaded. (informational)

**FIRST-- Search your own bank and DASite** to locate a record. If you find an OCLC Request Record *within your own bank*, add your item to it. A complete MARC record will replace it when the OCLC request is filled and automatically loaded. You will receive an e-mail message of the load along with every other librarian in the district.

**DO NOT copy an OCLC Request Record from another bank.** Your request for the brief record will NOT be registered in the Union Catalog OCLC Record Request Bank. Therefore the OCLC record can NOT be returned to you when the request is filled.

**SECOND— Search both the Union Catalog and Library of Congress.** If you are unable to locate a matching record at the Union Catalog or Library of Congress, exit back to your local menu and select "**Union Catalog OCLC Record Request Bank.**" Instructions for logging in follow in Part I below.

### Searching Guidelines

- Too broad a search will retrieve too many records to look at. Do a combination search on author **AND** title when too many titles are retrieved. When searching MultiLIS catalogs, try using the semi-colon (;) following a title to restrict the search to the exact string of characters
- Too narrow a search will result in no record(s) found. When searching MultiLIS catalogs, try truncation (\*) to account for possible typos in the title. **ISBN is NOT a good search criterion to use exclusively.**
- Follow the **INFOhio Guidelines for Matching MARC Records.** Minor differences do not negate a match. These guidelines can be found at [http://www.infohio.org/uc/about\\_uc.htm](http://www.infohio.org/uc/about_uc.htm).
- Do not assume that OCLC records are superior to INFOhio records. Many INFOhio records have been enhanced with annotations, subject headings, formatted contents notes, and the like, that academic and public libraries (the primary contributors to OCLC) may not use.

## Part I: Accessing Bank 20, the Union Catalog OCLC Record Request Bank

- A. **Select “Union Catalog OCLC Record Request Bank”** from the your local menu. Before accessing Bank 20 at the Union Catalog, the program LOADMARC will check to see if you have any unloaded records.

**If you have no outstanding files, you will be logged in automatically to the Union Catalog OCLC Record Request bank. See step B below.**

**If you have previously exported brief request records, but not loaded them, you will have the option to process those records first in the LOADMARC program, before logging into the OCLC Record Request bank. LOADMARC allows you to:**

- **Load the file** - The records will be converted and loaded into your database.
- **Delete the file** - The records will not be loaded into your database and the file will be deleted from your directory.
- **Quit** – The file will not be loaded into your database, but will remain in your directory where it can be loaded or deleted at a later time.

To leave the LOADMARC program and continue with the Union Catalog login, you must load and/or delete all files **OR** select “Quit.” (Make your selection by using the arrow keys or by entering the first letter and pressing [enter] key twice.) You will be logged into the Union Catalog OCLC Record Request bank. **See step B below.**

- B. **Verify that the username and number** shown at the top and bottom match exactly.

Example:

Compare the following information:

Username: MICHAEL 00009A33

With that shown below:

Username: MICHAEL 00009A33

Does this match exactly? (Y/N)

- C. If you have a match, answer **Y** and press **[enter]**
- If you answer **Y** by mistake, you will be logged in automatically to the Union Catalog OCLC Record Request Bank. Press [PF1] to exit and start over. ***If these do not match and you continue, the records you tag for export will not be exported or loaded to your bank.***
  - If you enter **N**, additional choices will appear one by one. If there finally is a match, answer **Y** and go on. If no matches are found, you will be returned to the Menu where you can try again.
- D. At the “MultiLIS User menu” **press [enter]**.
- E. At the user barcode prompt enter: **200x**
- F. At the password prompt enter: **OCLC**

If you encounter a problem, contact your DASite. Do NOT contact the Union Catalog or Tech Support. Your DASite provider will do that, if necessary.

- G. **Go to Part II.**

## Part IIA: Finding a Bibliographic OCLC Request Record & Making a Request

Individual requests for a bibliographic record are identified by the item record(s) attached to the bibliographic record. It is the item record General Location and Collection Codes that will enable the filled OCLC record to be delivered to the correct DASite(s) and overlay the Request Record(s) in the appropriate banks at the DASite. Therefore, the item record is ESSENTIAL. (Only ONE item record should exist for your district/bank, regardless of the number of branches within your district that want the record.)

- A. At the prompt for record number, press **[PF2]** to search for the record.
- B. **Perform a search** for the record as you did when searching the Union Catalog.
- C. If the correct record is **NOT LOCATED**, go to **Part IIB** on page 4 to create a record.
- D. If the correct record **IS LOCATED**, look at the items to determine if a request already exists for *your DASite AND your bank*. As stated above, only one item record for a bank at a DASite should exist.

### **If an item EXISTS for your DASite and your bank**

1. Respond **N** to "Is this the correct record?"
2. Later, look for this record in your own bank and add your items to it.
3. It is not necessary to add another request and it should not be necessary to export the record. Someone in your district has already done this. Therefore, look for this record in your own database and add your item to it. It will be replaced when the OCLC request is filled and the OCLC record automatically loaded in your bank. All library staff in your district will receive e-mail notification when filled requests are loaded.
4. Return to step A above to continue searching **OR** press [PF1] to exit.

- E. If an item for your DASite and Bank does NOT exist, at the prompt "Is this the correct record?" enter **Y**.
- F. At the prompt for item number, press **[PF3]**. (An item record number is assigned for tracking your request. When the request record is loaded to your bank, you will add your own barcode number in your own database.)
- G. At the prompt for "**General Location Code**," press **[enter]**. Your DASite will be entered by default. You will see it appear as both the code and the definition.
- H. At the prompt for "**Collection Code**," **enter your bank number and press [enter]**.
  - EXAMPLE: If you are bank one at your DASite, enter the digit 1. "Bank 1" will display as the description.
  - If you do not know your bank number ask your DASite provider. If the bank number is not entered OR if it is not entered correctly, an OCLC record will NOT be returned to you when the request is filled.
- I. Press **[PF1]** for shelf number.
- J. Press **[enter]** through the next five fields.
- K. At the prompt "**Field to Modify**," insure the bank number is correct and then press **[PF1]** to exit the item record.
  - If you made an error entering your bank number, this is your only opportunity to correct it.
  - **Once [PF1] is pressed it is not possible to access the item record again. You must then contact your DASite provider and request the correction. Please request the correction and do NOT create another item record.**

- L. At the prompt for "Item number" press **[PF1]** to exit the bibliographic record.
- M. At the prompt "Would you like to export this record?" enter **Y**. The record is now tagged for export. Even if you made an error in the bank number that you will be reporting to your DASite provider, you should still export the record if it is a record you want and is not already in your bank. The item record is not exported with the bibliographic record. Report the error to your DASite provider to correct so that you will receive the OCLC record when the request is filled.

It is IMPORTANT that you export each record you request. Requests placed at the Union Catalog under this procedure will contain the Union Catalog Bank 20 Control Number as the record control number for loading purposes. This control number will appear in the request records you export. This way, when the filled OCLC records are loaded to your bank, you will not have records rejected or records loaded as new. All requests placed under these procedures will overlay and replace the Request Record based upon this Union Catalog Bank 20 Control Number.

It is possible to tag an item for export only at the conclusion of adding an item. If you fail to do this and must create another item record, inform your DASite provider so the duplicate item can be removed.

- N. [Record queued for export] will appear on the screen. **Press any key** to return to "Record number" prompt.
- O. Return to Step A to continue searching for records **OR** proceed to Part III on page 8 to load the tagged for export request records to your bank for circulation purposes.

## Part IIB: Creating a Bibliographic OCLC Request Record & Making a Request

- A. If the correct record was not located, press **[PF1]** to exit the search mode.
- B. At the prompt "Would you like to create one?" enter **Y**.
  - You will be presented with a cataloging workform consisting of the fields below.

**Please read these instructions regardless of your cataloging experience.  
Special conditions are addressed within. *Any records without the mandatory fields will be rejected* by the program that eliminates Request Records determined to be too brief.**

1. ISBN: An "entry screen" will appear. (REQUIRED IF AVAILABLE)
  - a. **Enter the ISBN without dashes** and press the **[enter]** key.
    - Enter a single ISBN. This may be found in the CIP information on the verso page (back of the title page). It may also be found on the back of the book.
    - You may then enter a second ISBN on line 2 and press the **[enter]** key. Add additional ISBNs if they exist. DO NOT enter more than one ISBN on a line.
    - Enter duplicate ISBNs only in circumstances where one is for the set and others are for each volume in the set. Enter each on its own line number on the ISBN entry form.
  - b. Press **[PF1]** to advance to the next entry.
  
2. Edition statement: (REQUIRED IF AVAILABLE)
  - a. Enter **edition** for print materials or **version** number for computer or interactive multimedia. This is helpful in discriminating between two different editions or versions of a title.  
EXAMPLE:   Rev. ed.  
              3rd ed.  
              Version 2.0
  - b. Press **[enter]** to advance to the next entry.

3. Publication date: **(MANDATORY)**

- a. Enter both publication/distribution date and copyright date if both are available. Precede the copyright date with the letter "c."

EXAMPLE:       c1989                               <copyright date only  
                  1990, c1989                    <publication date and copyright date

- IMPORTANT-- If there is no date identified on the item, it is important to indicate this by entering "1111" (without the quotation marks). **DO NOT leave this field empty.**
- When this request record is loaded to your bank for circulation purposes, the "1111" will be replaced with "[n.d.]" for no date on item. You will not see "1111" appear as a date in your database.

- b. Press **[enter]** to advance to the next entry.

4. Publisher: An "entry screen" will appear. **(MANDATORY)**

- a. Enter place of publication and publisher / distributor.

- This field is subject to authority control.
- If a popular publisher that will be in the authority file such as Scholastic, TAB Books, Franklin Watts, etc., you can enter just the publisher. If you do not know if the publisher is likely to be in the authority file you should enter city, state (2 letter code in capitals) followed by a space, colon, space and the publisher / distributor. EXAMPLE: Parsnippany, NJ : Dillon Press
- If the place of publication is unknown, enter sl : *publisher*.  
EXAMPLE:       sl : Publishing Partnership Texas Monthly, Inc.

- b.

b1. **If "Single Entry" prompt appears**  
1. Check spelling and formatting. If correct, select "Single Entry" and press [enter].

b2. **If list of authority headings appears**  
1. Select the one that best matches your item and press [enter].

b3. **If the publisher and place of publication are not on the list and you need to add it, check the spelling.**  
1. If entry is correct, press the number zero for the prompt to create a "Single entry."  
2. Enter a **Y** at the prompt for "single entry" and press [enter].  
3. The following prompt will most likely appear: "Would you like ISBD standardization?" Enter a letter **Y**.

b4. **IMPORTANT--** If there is no publisher identified on the item, indicate that there is no publisher by entering "sl : sn" (without quotation marks) for no location and no publisher name.  
EXAMPLE-- Publisher: sl : sn

- Select the appropriate number from the list of authorities.
- It is **IMPORTANT** to indicate that the information is not available. **DO NOT** skip this field.

- c. At the prompt for number 2, Press **[PF1]** to advance to the next entry.

5. Author: An "entry screen" will appear for the author. (REQUIRED IF AVAILABLE)

a. Enter author name-- last name first.

- If there is no author, enter the editor, compiler, or entity that is responsible for the creation of the item.

EXAMPLE: Adoff, Arnold, comp.  
Arberry, A. J., ed.  
Cannon, Janell, illus.  
Boy Scouts of America

- This field is subject to authority control.

b. b1. If "Single Entry" prompt appears

1. Check spelling. If correct, select "Single Entry" and press [enter].

b2. If list of authority headings appears

1. Select the one that best matches your item and press [enter].

b3. If the author or responsible agent is not on the list and you need to add it, check the spelling.

- If entry is correct, press the number zero for the prompt to create a "Single entry."
- Enter a **Y** at the prompt for "single entry" and press [enter].
- The following prompt will most likely appear: "Would you like ISBD standardization?" Enter a letter **Y**.

c. After having entered each author, press **[PF1]** to advance to the next entry.

6. Title proper: An "entry screen" will appear for the title. **(MANDATORY)**

a. **Enter the title** as completely as possible for a good match. Include any subtitles or parallel titles.

Pressing [enter] may result in the prompt "Would you like ISBD standardization?" Enter a letter **Y**.

b. Press **[PF1]** to advance to the next entry.

7. Description: **(MANDATORY)**

a. This is the place to describe the physical item. It is especially important for non-print material. Please enter in the following order and separate each data element with a double dash:

- Number of pages

EXAMPLES: 73 p.  
xii, 200 p. -- illus. -- maps

- Number of pieces and format if non-print (i.e., videodisc, VHS, CD, etc.)

EXAMPLE: 4 records -- 33 1/3 rpm

- Length in minutes

EXAMPLE: 2 videocassettes -- 120 mins.

- For computer material: enter format, size, operating system, analog or digital

EXAMPLE: 2 computer disks -- sd -- col-- 5 1/4 in -- Apple IIe, IIc, IIGS -- 128K

- **DO NOT leave this field blank.** If the item is a book and pages are not numbered, please indicate that. EXAMPLE: unpagged

b. Press **[enter]** to advance to the next entry.

8. Series: An "entry screen" will display for series. (REQUIRED IF AVAILABLE)
- a. Enter series title if appropriate.
    - This field is subject to authority control.
  - b.
 

b1. If "Single Entry" prompt appears

    1. Check spelling. If correct, select "Single Entry" and press [enter].

b2. If list of authority headings appears

    1. Select the one that matches your item and press [enter].

b3. If the series is not on the list and you need to add it, check the spelling.

    1. If entry is correct, press the number zero for the prompt to create a "Single entry."
    2. Enter a **Y** at the prompt for "single entry" and press [enter].
    3. The following prompt will most likely appear: "Would you like ISBD standardization?" Enter a letter **Y**.
  - c. Press **[PF1]** to advance to the next entry.
9. Notes: (REQUIRED IF AVAILABLE)
- a. If a periodical, enter the ISSN number here and press [enter].
  - b. If there are additional pieces that accompany the item, enter here and press [enter].
  - c. Add anything else that might be helpful in identifying your item. Please press [enter] after each entry.
  - d. If the title does not describe the content of the item, enter what the item is about. Include anything that might help to identify the item you have in hand.
 

EXAMPLES:

    - (1) Item is not about dentistry but about dinosaur jawbones.
    - (2) Includes a computer diskette
    - (3) Teacher's manual
    - (4) Black line masters
    - (5) Student workbook
  - e. Press **[PF1]** to exit the entry screen.
10. Item: (**MANDATORY**)
- a. At the prompt for item number, press **[PF3]**. (An item record number is assigned for tracking your request. When the request record is loaded to your bank, you will add your own barcode number in your own database.)
  - b. At the prompt for "**General Location Code**," press **[enter]**. Your DASite will be entered by default. You will see it appear as both the code and the definition.
  - c. At the prompt for "**Collection Code**," **enter your bank number and press [enter]**.
    - EX. If you are bank one at your DASite, enter the digit 1. "Bank 1" will display as the description.
    - If you do not know your bank number ask your DASite provider. If the bank number is not entered OR if it is not entered correctly, an OCLC record will NOT be returned to you when the request is filled.
  - d. Press **[PF1]** for shelf number.
  - e. Press **[enter]** through the next five fields.
  - f. At the prompt "**Field to Modify**," insure the bank number is correct and press **[PF1]** to exit the item record.
  - g. At the screen entitled "Update items linked to a record" press **[PF1]**.

- h. **Review the data to insure accuracy and completeness.** Modify fields if necessary and **press [PF1]** to exit the bibliographic record.
- Once you exit the bibliographic record by pressing [PF1] you will NOT be able to access it or the item record again for modification. If you discover an error after pressing [PF1], contact your DASite support staff person immediately, and describe the correction that needs to be made. Your provider will make the correction for you. **DO NOT** create another record.
- i. At the prompt "**Would you like to export this record?**" enter **Y**. The record is now tagged for export. Even if you made an error which you will be reporting to your DASite provider, you should still export the record, unless the error is such that you do not want the record and you will be asking your provider to remove it from the OCLC Record Request bank.
- It is IMPORTANT that you export each record you request. Requests placed at the Union Catalog under this procedure will contain the Union Catalog Bank 20 Control Number as the record control number for loading purposes. This control number will appear in the request records you export. This way, when the filled OCLC records are loaded to your bank, you will not have records rejected or records loaded as new. All requests placed under these procedures will overlay and replace the Request Record based upon this Union Catalog Bank 20 Control Number.
- It is possible to tag an item for export only at the conclusion of adding an item. If you fail to do this and must create another item record, inform your DASite provider so the duplicate item can be removed.
- j. [Record queued for export] will appear on the screen. **Press any key** to return to "Record number" prompt.
- k. Return to Part IIA to continue searching for records OR proceed to Part III to load the tagged for export request records to your bank for circulation purposes.

### Part III: Loading a Request Record into Your Bank

- A. When finished adding items and tagging for export, press **[PF1]** at the "record number" prompt to exit the "Add Items" function.
- B. Choose, "**Export bibliographic records**" to complete the export of the tagged records.
- C. Choose, "**Begin MARC export to host.**" A few messages will flash by ending with "Press any key to continue".
- D. **Press any key.**
- E. Press **[PF1]** when prompted for user barcode.
- If you have exported records and forget something, **DO NOT** log back in here to continue searching. If you do, your file will be lost. You **MUST** complete the steps below and return to Part 1 A if you wish to search for more records.
- F. Reply **Y** that you would like to quit.
- G. Press **[PF1]** to exit MultiLIS and logout of the Union Catalog Record Request Bank. You may see "Connection Closed" appear on the screen. Be patient; you will be logged out automatically and will automatically go into the LOADMARC program.
- H. A box displaying the export file will display on the screen, **press [enter] to load the file.** If you arrow down to "Quit" and press [enter] you will be returned to the local menu. The file will remain in your directory and can be loaded later.

```

---Files Retrieved But Not Loaded---
LNOCA_LOIS_DA62_99050722452296$MARC.DAT100;1      7-MAY-1999 22:47:40
Quit

```

- I. The list of tiles will display and you will have three options. If you wish to load the file **press [enter]** and continue to step 'J' below. If an error was made you can delete the file. You can also "Quit" and load or delete the file later. Both delete and quit will return you to the local menu.

```

---Select Process---
Load the file
Delete the file
Quit

```

```

---Titles (245 tags) within the selected file---
0$aElephants /$cby Cynthia Overbeck ; photos. by Tokumitsu Iwago ; [transla
0$aElephants /$cElin Kelsey.
0$aElephants /$cLeonard Lee Rue III.

```

- J. You will see a box appear on your screen titled "Loading File." This contains information regarding the conversion. When the load has finished, the box below will appear. **Press [enter]**.

```

---Informational Message / Press Return to continue---
The load process has finished

```

- K. If another message appears on your screen reporting that you have received mail, you will need to press [enter] a second time.
- L. **On your own system** select "**Add Items**" from either the Cataloging or the Circulation Module.
- M. You will be prompted for a record number. You can use the load report that was e-mailed to you for the record numbers **OR** you can press **[PF2]** to search for the records.
- N. At the prompt for "**Item number:**" assign **your local barcode number** and complete the item record as usual. This item can now be circulated while awaiting a full OCLC record.
- O. Repeat steps M and N for each request record that was imported.

**DO NOT** modify your bibliographic record by adding MultiLIS fields such as Document type, Subject keyword, or Local characteristics. These fields will be removed when the full OCLC record is loaded. See Part V below.

## Part IV: E-mail Message Reporting the Load of the Request Record.

You will receive an e-mail message reporting the load of the file of request records. The subject of the e-mail will be "OCLC Brief Request Record Load" or "\*\*\*REJECTED\*\* OCLC Brief Request Record Load." This e-mail consists of three parts.

The **first part** is an instructional message.

The **second part** is a report of the requested titles. If the Request Bank rejects a request record, the rejected record will be included in this section and the reason(s) will be reported in tag(s) 999 of the rejected record. Per the e-mail message, the rejected record(s) will not be included in the records loaded into your bank and will be removed from the OCLC Request bank. If the rejection is due to a missing 245, 260 \$a and/or \$b, or 300 tag, the request can only be corrected by entering a new request and following all instructions for entering mandatory fields. If the **only** reason for rejection is due to missing or incomplete item information for your DASite and/or bank, you can go back to the Request Bank, enter a new item and export the record again. **This must be done the same day you created the request record.** Rejected records are removed from the Request Bank nightly.

The **third part** of the message is a report of the actual load to your bank and it begins with a summary paragraph that starts as follows:

```
Number of records N in the batch load :
```

All records should have loaded as new. You can ignore the messages reporting fields modified.

Contact your DASite provider if you have any questions or difficulties.

## Part V: Printing a Branch Report of Unfilled OCLC Requests.

You may wish to go into Report Production to create the report "OCLC Requests." If you need to add MultiLIS fields you should make note of that on this report so that it can be done **after** the OCLC request has been filled and the OCLC record loaded to your bank. This report can be accessed from the MultiLIS Menu.

Library Reports  
Report Production  
Cataloging  
General Reports  
OCLC Request Report

## Part VI: Bank Report of OCLC Records Loaded.

Filled requests will be loaded to the requesting bank(s) at each DASite on a monthly basis. If any of your district requests have been filled and loaded to your bank, you will receive an e-mail report of the load along with every librarian in your bank (district). The subject of the e-mail will be "UC OCLC load for *DASite\_bank\_date* . MARC." Follow the instructions in the e-mail for examining the report.

All filled OCLC request records should load as "Record replaced." If any filled OCLC request records load as new or are rejected, you should contact your DASite provider for assistance.

If any part of this communication requires clarification please e-mail, Union Catalog Task Force Co-Chairs, at UCTF\_Chairs@INFOHIO.ORG

**The following documents:**

***OCLC Record Request Instructions – Complete***  
***OCLC Record Request Instructions – Abridged***

**Are available at the INFOhio Web Site:**

[http://www.infohio.org/uc/about\\_uc.htm](http://www.infohio.org/uc/about_uc.htm)