# Using the Z39.50 Interface to access OCLC's WorldCat

The only source of bibliographic records for PINES is OCLC's WorldCat bibliographic database. The Z39.50 interface within Evergreen is set up for access only to WorldCat. Using this resource, you can search and import MARC records into the PINES database. When there is no matching record in the PINES database for your title or you need to replace an existing record with a better one, you will need to import one from OCLC's WorldCat database using the Z39.50 interface.

## Navigating and Customizing the Z39.50 Interface

Access to the Z39.50 gateway is on the portal page, under the **Cataloging** menu (**ALT G, CTRL Z**), or from the **Create MARC Record** Button:
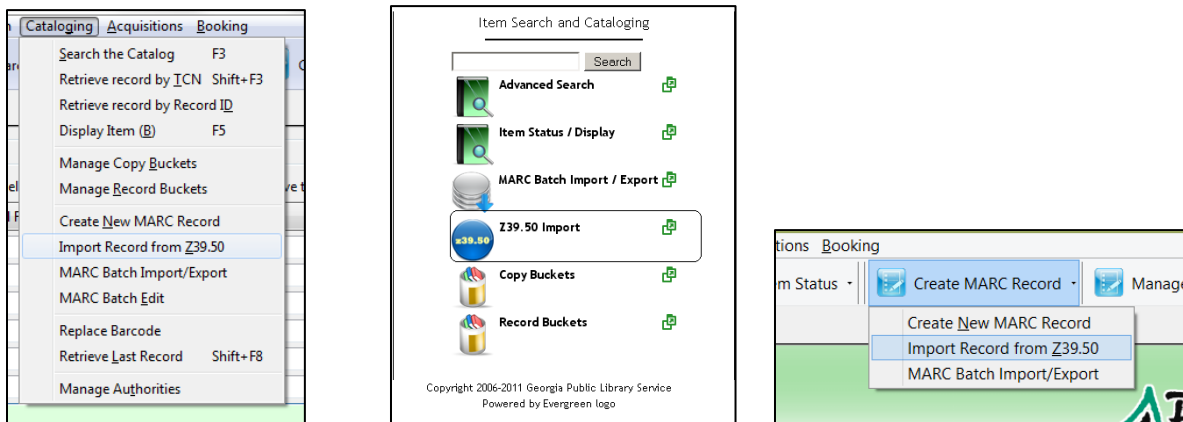


The search and results interface for Z39.50 gateway access can be displayed from any of those three places:
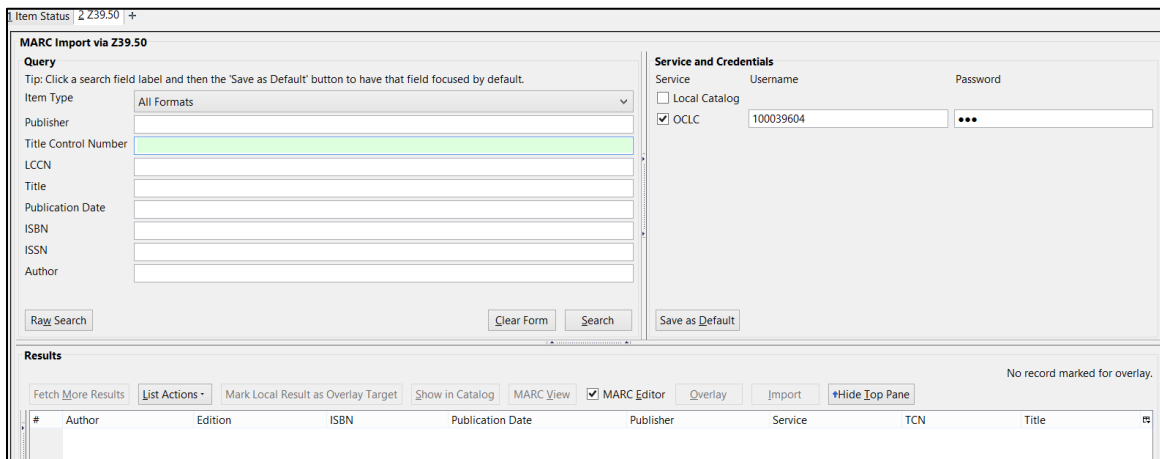
The **Query** section of this screen is where you enter your search terms and filters. It can be resized by grabbing the bars with your mouse:
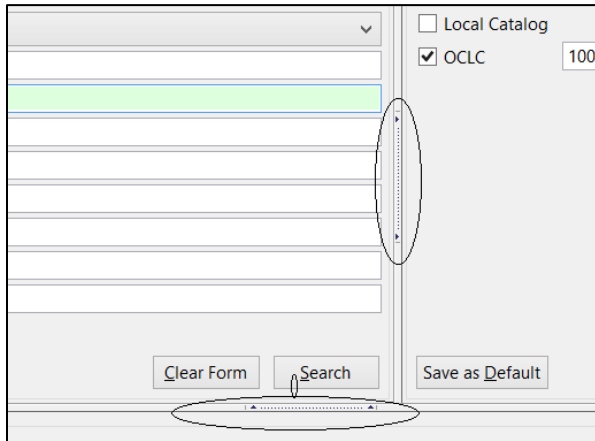


## Service and Credentials

Since you will be searching OCLC, you will need to use the authorization and password assigned to your library by OCLC. Under **Service and Credentials**, check the box for **OCLC** and input the authorization number as **Username** and the password as the **Password. Save as Default (CTRL D**) to retain the login information for subsequent sessions.

After you have saved your OCLC authorization and password, you will not need to input it again unless an update of your workstation software results in the screen returning to default, you need to re-register the workstation at login, or you get a new workstation. Keep in mind that the input wells for the authorization and password can be accidentally edited. If you get a network server error when you search, check your login to see if it is correct.

Make sure the **Local Catalog** button remains unchecked. If it is checked, the interface searches both WorldCat and the PINES database. Results will be labeled under the **Service** column as either **oclc** or **native-evergreen-catalog**:



If you should import a record from the **native-evergreen-catalog**, an exact duplicate of the record is loaded into the PINES database. This record will have the original record's **Record ID** as the TCN. It will need to be merged with that existing record.

If you commonly perform the same type of search, you can have that search field focused by default. Click on the search field label:



Then click on **Save as Default** (**CTRL D**). This will be your default for all subsequent Z39.50 sessions. Best practice is for PINES catalogers to check the **MARC Editor** box.

## Customizing the Results display

In order to open a record in MARC edit, make sure the **MARC Editor** button is checked:
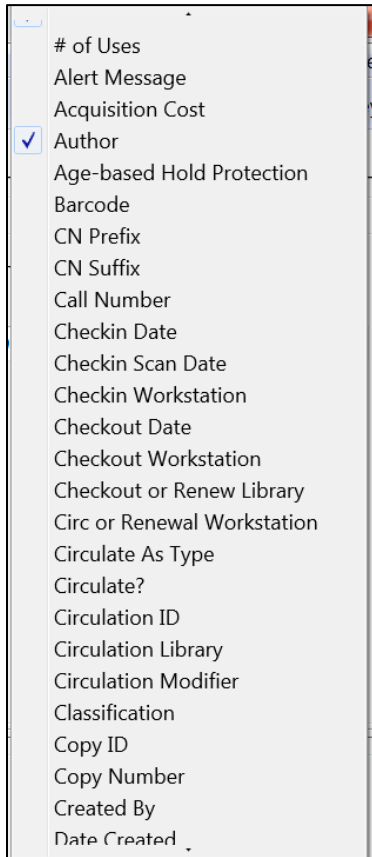


If this is not checked, when you import a record, you will see the click through dialog box informing you the record was imported but the record will not display in MARC edit.

The buttons **Mark Local Result as Overlay Target** and **Show in Catalog** will only be active searching the local catalog. Use care searching in the local catalog from the Z39.50 interface since accidentally importing a native-evergreen-catalog record results in duplication. Best practice for PINES catalogers is to search the local catalog using **Advanced** or **Basic Search** or **Record Query** in the **Record Bucket** interface.

The **Results** display can be customized and arranged. Use the column picker to pick fields you want displayed:

# of Uses
Alert Message
Acquisition Cost
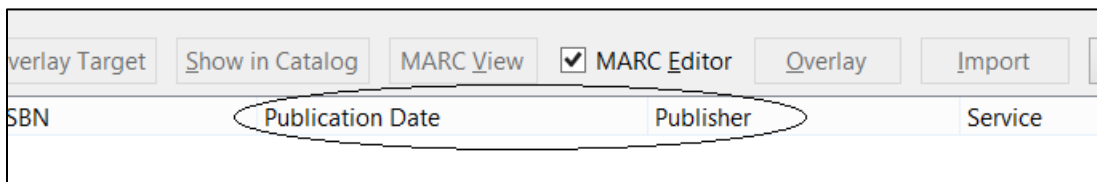✓ Author
Age-based Hold Protection
Barcode
CN Prefix
CN Suffix
Call Number
Checkin Date
Checkin Scan Date
Checkin Workstation
Checkout Date
Checkout Workstation
Checkout or Renew Library
Circ or Renewal Workstation
Circulate As Type
Circulate?
Circulation ID
Circulation Library
Circulation Modifier
Classification
Copy ID
Copy Number
Created By
Date Created

Scroll down or up to see the columns available.

Rearrange the column order by grabbing the column title with your mouse and moving it to your preferred location. For example, with your cursor on **Publisher**:

rget   Show in Catalog   MARC View   ✔ MARC Editor

        Publisher                  Publication Date
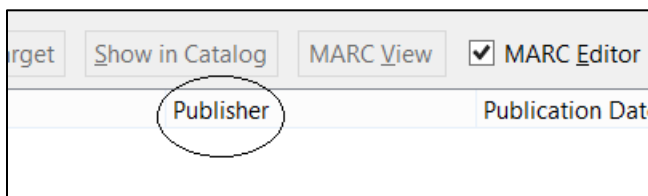
Click and hold with the left mouse button and move your cursor to the right of **Publication Date**. When you release the button, the column will have moved to its new location:

verlay Target   Show in Catalog   MARC View   ✔ MARC Editor   Overlay   Import

SBN          Publication Date              Publisher          Service

To save your customized column list and/or arrangement, **Save List Configuration** under the **List Actions** button:
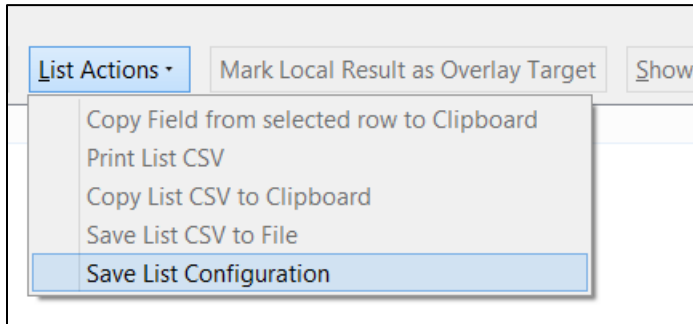


Clicking on the column labels will order the result set by that column. For example, if you click on the **Publication Date** column, the list will be ordered by publication date. Clicking on the column title once orders it from most recent to earliest, or A to Z. Clicking a second time reverses the order so that the earliest is at the top of the list. This only orders the number of titles you have displayed. You have to fetch all the results to order every record in the result set.

## Searching via the Z39.50 Interface

Most of your searches can be input into specific search wells or you may need to construct what are called raw searches for certain searches. The search wells are for **LCCN, Publication Date, Author, ISSN, ISBN, Title,** (OCLC) **Title Control Number,** and **Publisher**. You can combine search terms (author/title, title/publisher, etc.). Raw searches are input using the **Raw Search** button and are used by PINES catalogers for 024 (UPC – Universal Product Code) and 028 (publisher or music number) searches. This search cannot be combined with the other searches.

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*NOTE*: As of February 2017, version 2.11.1, a bug in Evergreen means that the order of the search wells can change each time you open the interface.

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You can also filter searches by **Item Type** from the dropdown menu:
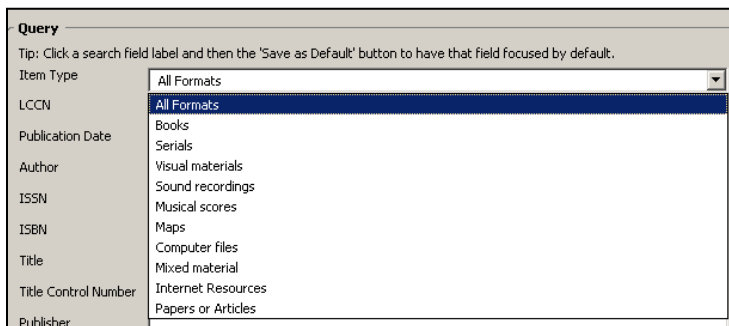


Once you have entered your search terms, click on the **Search** button to connect to OCLC's WorldCat and process your search.
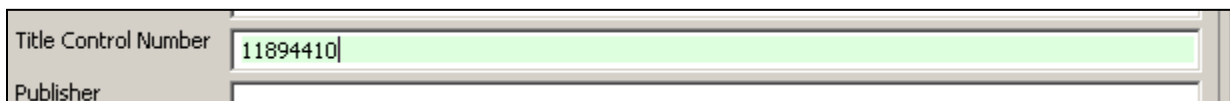
The **Clear Form** button clears the search form and resets to your default search box:
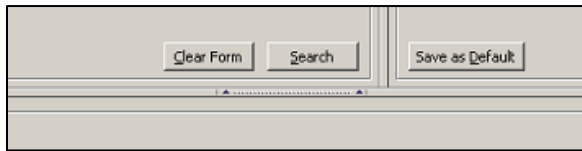


# Number searches

## Title Control Number searches

Search OCLC title control or accession numbers without prefixes, leading zeros, or the symbols # or *. For example 11894410 rather than ocm11894410:



## ISBN and ISSN searches

Drop all hyphens or dashes when searching ISBNs (International Standard Book Number). Enter an ISSN (International Standard Serial Number) with the hyphen.

## LCCN searches

LCCNs (Library of Congress Control Numbers) can be searched with or without hyphens. For example "92-50730" or "92050730".

## UPC, Music or publisher number searches (Raw searches)

Currently, music or publisher numbers and UPC numbers are only searchable in Evergreen through the **Raw Search** function. Underneath the defined search boxes is the **Raw Search** button. Click on it for a text box to enter a search string for numbers in the MARC 024 or 028 fields.
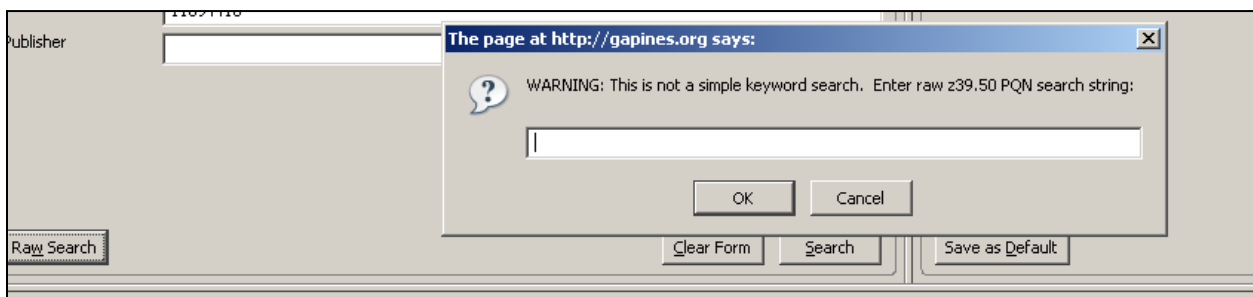


The search strings must be constructed using use attributes, which specify access points such as identifying numbers, and structure attributes, which specify the type of search such as word or phrase.

For the 024 (UPC), the use attribute is @attr 1=1007 and the structure attributes is @attr 4=6 [number]

For the 028 (publisher/music number), the use attribute is @attr 1=51 and the structure attributes is @attr 4=2

The configuration for the searches are:

024: @attr 1=1007 @attr 4=6 [number]

028: @attr 1=51 @attr 4=2 [number]

Retain most punctuation except spaces in the number. For example, for the music number in the 028 field CCD-2248-2, construct the raw search as: @attr 1=51 @attr 4=2 CCD-2248-2, or @attr 1=51 @attr 4=2 CCD22482
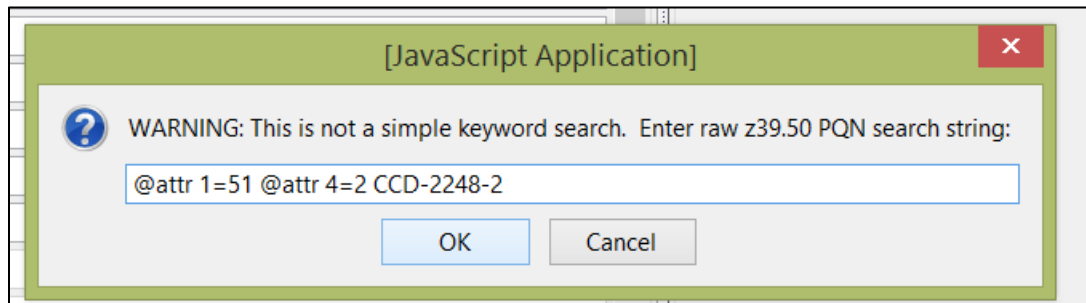


Click on **OK** to process the search.

For a number with a prefix, @attr 1=51 @attr 4=2 QCT38653 [no space after QCT]

For more information on raw searches in the Z39.50 gateway, see the online documents:

OCLC. (2017). Searching Tips for OCLC Z39.50 Cataloging. Retrieved February 17, 2017, from http://www.oclc.org/support/documentation/z3950/searchtips/.

OCLC. (2017) Z39.50 Configuration Guide for OCLC Z39.50 Cataloging. Retrieved February 20, 2017, from https://www.oclc.org/support/services/z3950/documentation/config_guide.en.html

Library of Congress. (2014) Bib-1 Attribute Set Retrieved February 20, 2017, from http://www.loc.gov/z3950/agency/defns/bib1.html

Library of Congress. (1995) Attribute Set Bib-1 (Z39.50-1995): Semantics Retrieved February 20, 2017, from https://www.loc.gov/z3950/agency/bib1.html

You may find it easier to search for music and other numbers directly in OCLC through the Connexion Client. Any search that returns a large number of records also might be better searched in the Client, where there are more options to filter out unneeded results.

**NOTE:** If in the **Service and Credentials** area you have selected BOTH **Local Catalog** AND **OCL**C, the **Raw Search** is grayed out and unavailable. In order to do a **Raw Search**, the **Local Catalog** selection must be unchecked.

## Title, author, and publisher searches.

You can also search by author, title, publication date and/or publisher. The title does not have to be complete. For example, rather than the complete title *Stars in my pocket like grains of sand*, you can search *stars pocket grains.* You can also search using terms from a subtitle.

You can also search using a partial author name or a publisher; however, care should be taken to prevent the retrieval of too large a result set.

You can create combination searches using any of the search queries to refine your search. For example you can search author, title, and publication date.

## Publication date filter.

Publication dates can be single (1960) or a range, such as 1995-2006.

## Results

View your selected title by highlighting it and clicking on the **MARC View (CTRL V)** button:



The **Results View** button returns to your results:



The **Hide Top Pane** button is useful when you wish to see the entire search list or the complete record:



Click on the **Show Top Pane** button to display the Z39.50 search boxes.

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The **List Actions** drop-down menu allows you to copy fields from a row, print, or save CSV formats of the result set or save any changes you make to the list configuration.
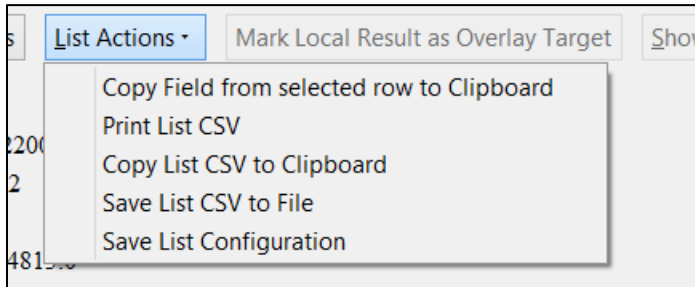


## Fetching more results

Searches are returned 10 records at a time. By clicking on **Fetch More Results** you can list 10 more until you reach the total number retrieved.

# Importing OCLC Records from the Z39.50 Interface

Once you have identified a record that matches your item in hand, you are now ready to import the OCLC record into the PINES database.

From either the **MARC View** or from the list of records returned, with your record highlighted, click on the **Import** (**ALT I**) button:
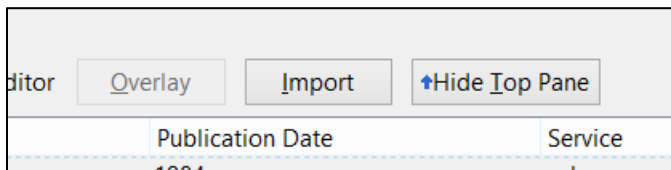


A new tab will open with the selected record in the **MARC Editor**, provided the **MARC Editor** box is checked on the **Results** interface..

hecking the **Stack subfields** box, changes the record display so that subfields are entered on separate lines rather than as a string:



Checking the **Flat text editor** box changes the display to a plain-text MARC format that permits easier copying and pasting between records and moving, adding, and deleting fields and subfields within a record. You must follow the structure:

- = Beginning field
- Space after field tag
- $ Subfield delimiter
- \\ Blank indicators
- No spaces between subfields.



Several MARC fields are set by PINES staff to be stripped automatically from the record by Evergreen on import or overlay. These are: 029, 263, 938, 948, and 952. You do not need to delete these fields from the record before import.

Make any necessary edits to the bibliographic record. When you are ready to import, click on the **Import Record** (**CTRL D**) button. The **MARC Editor** tab will redisplay the record in your chosen default view. You are now ready to add holdings.

If a record exists with the same OCLC title control number as the record you are importing, an error message will display, stopping the process. You will be able to overlay the record or cancel

the import. Best practice is usually to cancel the import and bring up the matching record in PINES using the TCN provided. You can then proceed to add holdings or overlay a more recent WorldCat record.

## Fast item add

PINES has not fully implemented **Fast Item Add** because of several limitations. Fast item add should only be used to add items to your login or workstation library. Editing the owning library from the workstation library creates an empty volume that must be deleted. The default item status is **Available** rather than **In process** so should be edited with other item attributes in order to facilitate holds. (If you wish to use Fast item add, please contact the PINES and Collaborative Projects Manager for assistance.)



## Validate

Clicking on the **Validate** button automatically checks headings under authority control against the PINES authority file, facilitating linking headings within the database. Validating does occur with overnight scripts and with work by an authority control vendor, so it is not necessary to validate at the time of import. However, it does allow you to immediately link headings manually as well as give catalogers an opportunity to correct errors. After the validation process, headings in red mean that a record has not been identified. This does not necessarily mean that a record does not exist in our authority file, just that it was not located by the search. To verify, right click on the heading and navigate the resulting browse list to find a matching record. If you find one, move your cursor to the arrow and then click on Apply Full Authority. (It can take longer than expected for the browse authority list to load.)

A subfield 0 with the authority record number will be attached to the field.

```
082 0 0 ‡a 813/.54  ‡2 19
100 1   ‡a Delany, Samuel R.  ‡0 (GaAaGPL)62335
245 1 0 ‡a Stars in my pocket like grains of sand
260     ‡a Toronto ;  ‡a New York :  ‡b Bantam B
300     ‡a 368 pages ;  ‡c 24 cm
336     ‡a text  ‡b txt  ‡2 rdacontent
```

Authority record control number

Only validate 6xx (subject) headings with second indicator 0.

## Overlaying Existing PINES Title Records with a Matching OCLC Record

An essential database clean-up function is overlaying existing records in PINES with current records from OCLC. While the most likely reason to overlay is to improve a poor quality record, you will also want to overlay an existing record that does not have an OCLC based TCN or that has been upgraded to RDA or may have improved subject or name headings in its current form in OCLC. In general, overlaying also is performed in conjunction with merging duplicate records. When you have identified a PINES record to be overlaid, you will need to mark ii for overlay. In the **Action for this Record** menu, choose **Mark for Overlay (CTRL M)**
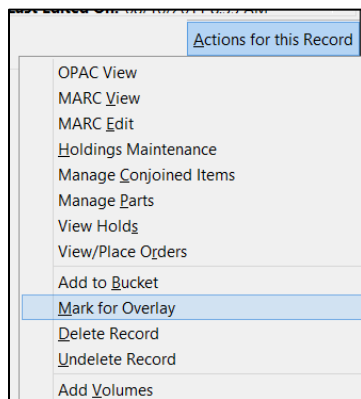


A note at the bottom of the screen indicates which record has been marked for overlay.

Open a new tab to search OCLC in the Z39.50 gateway and identify a matching OCLC record to overlay. The interface identifies the TCN of the record to be overlaid:
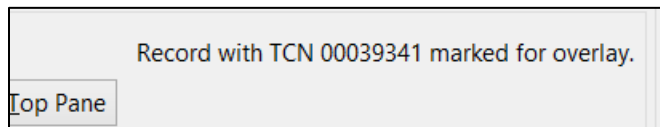


When you have chosen a matching record, click on the **Overlay** button (**CTRL O**). The button will be grayed out if no record is marked for overlay.

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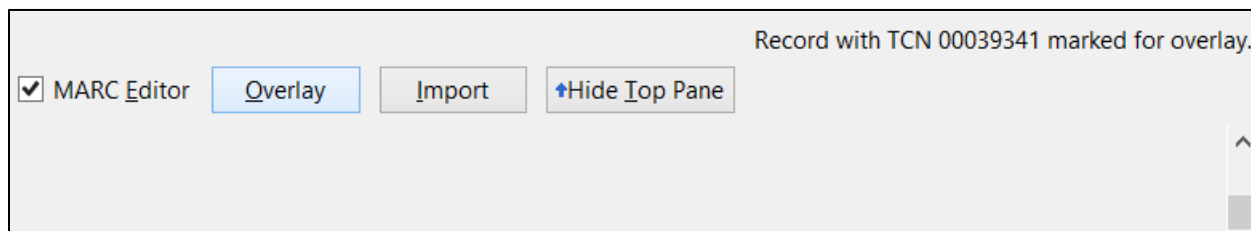
The record will open in a **MARC Editor** screen. Make the necessary changes to the record and when you are ready, click on the **Overlay Record** (**CTRL D**) button. Another box will open with the record from the PINES database to be overlaid:
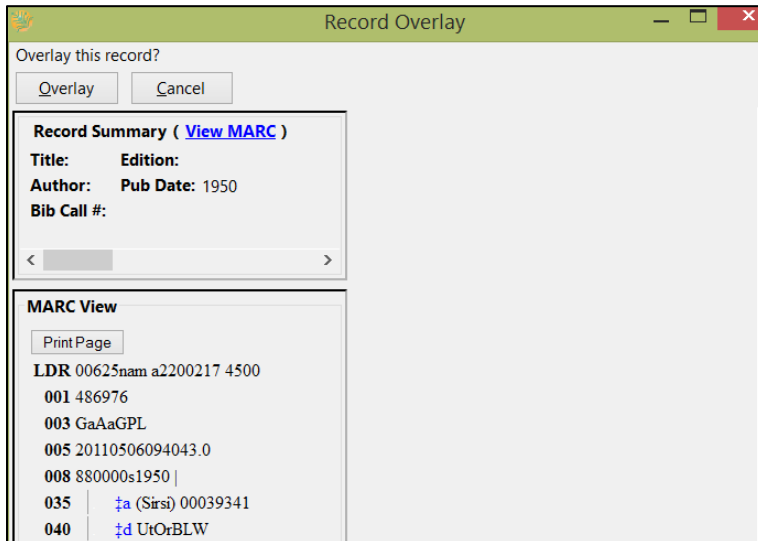


Confirm that this is the correct one. If it is the correct record, click on the **Overlay** button (**CTRL O**). A dialog box will tell you the record was successfully overlaid. Click on **OK.** The record will redisplay in your default view in the same tab as the MARC editor.

If, after you have edited a record for overlay, you discover the incorrect record is about to be overlaid, click on the **Cancel** button (**CTRL C**). You can leave the **MARC Editor** tab open while you find the correct record in the PINES database, and **Mark for Overlay**. Return to the **MARC Editor** tab in the Z39.50 interface and confirm that the correct record is marked for overlay. Proceed with editing and overlaying record as described above.

If a record exists with the same OCLC title control number as the record you are using for overlay, an error message will display, stopping the process. You will need to cancel the import. You should then retrieve the OCLC record from the PINES database and merge the two using a record bucket. You may then overlay the resultant record with the most recent OCLC WorldCat record, if necessary.

## Preventing importing duplicate records

Please keep in mind that the many records in the PINES database do not have OCLC number based TCNs. If you import an OCLC record into PINES and the OCLC number is used for an existing record TCN (title control number), you will get a warning that the record already exists in PINES, as above. However, if the incoming record has a match in PINES; but, its TCN is not an ocm or ocn TCN, Evergreen does not generate a warning. So please search and match your items carefully before importing a new record. Best practice is to overlay an OCLC record onto an existing PINES record (or merge if the OCLC record is already in the database) that does not contain an OCLC number based TCN whenever you encounter them.