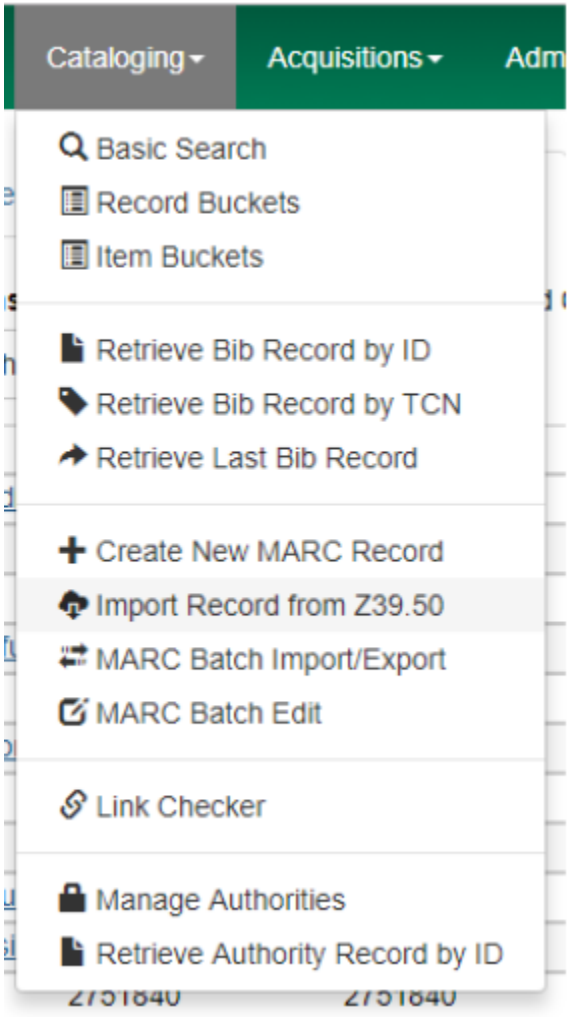
The Z39.50 Interface: searching and importing from OCLC’s WorldCat

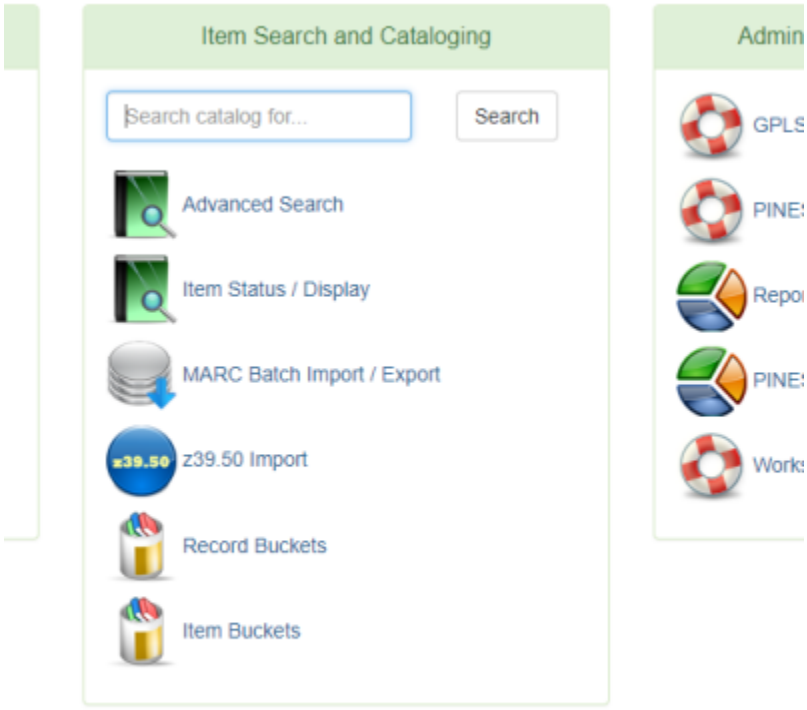
If there is no matching record in the PINES database for your title, you will need to import a record into the PINES database from OCLC’s WorldCat database, the sole source of bibliographic records for PINES. Access to WorldCat is via the Z39.50 gateway in Evergreen. Using this resource, you can search WorldCat and import MARC records into PINES.

Interface Basics

Access to the Z39.50 gateway is under the **Cataloging** menu:



And the home page:

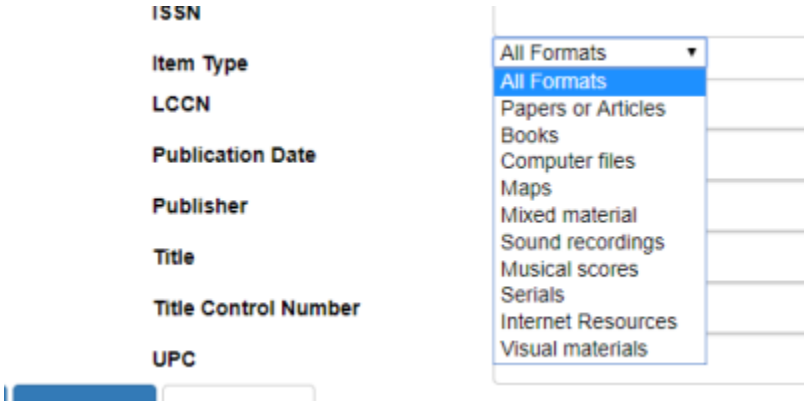


Since you are searching OCLC, you will need to use the authorization and password assigned to your library by OCLC. Under **Service and Credentials**, check the box for **OCLC** and input the authorization number as **Username** and enter the password. Click on **Save as Default** to retain the login information for subsequent sessions.

After you have saved your OCLC authorization/username and password, you will not need to input it again unless you clear cookies in your browser. 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.

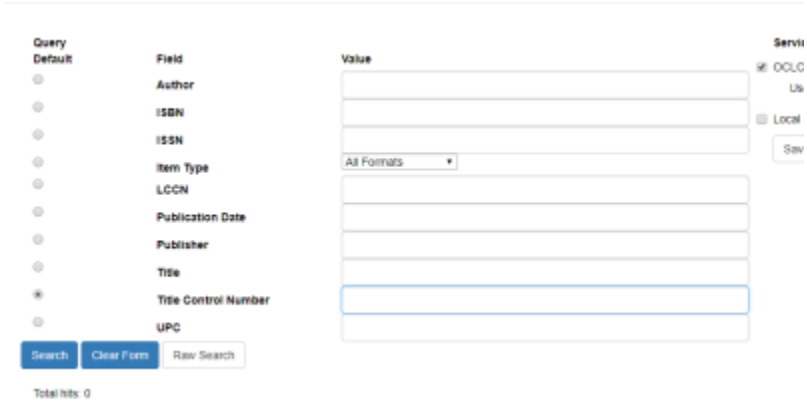
Searches are input into specific search wells for Author, ISBN, ISSN, LCCN, Publication Date, Publisher, Title, (OCLC) Title Control Number, and/or UPC (024 (other standard identifier) or 028 (Publisher or Distributor Number)). You can combine search terms (author/title, title/publisher, etc).

You can also filter searches by Item Type:



Raw searches are no longer necessary since the 024 and 028 fields can be searched in the UPC search box.

If you use one of the search indexes more often than others, you can set it as your default search so that your cursor is in that well when the interface is opened. Set your default search by clicking the circle under **Query Default**. You can change the default at any time.



There is no need to check Local Catalog under Service & Credentials. PINES catalogers should search the PINES database for records using Advanced or Basic search and not the Z39.50 interface.

Click on the **Search** button to connect to OCLC and process your search. You can view up to 100 records on a page.

The **Clear Form** button clears the search form and resets to your default search box.

Once you have highlighted a record, the **Import, Edit then Import, View MARC,** and **Overlay** buttons become active.

View a record by highlighting it (even if only one is in the result list) and clicking on the **View MAR**C button or choosing it from the **Actions** menu.

Personalize the columns in **Manage columns**, accessible from the column picker drop down menu. You can also print the grid and save it as a CSV file from here.

Show in Catalog and **Mark Local Resource As Overlay Target** are only visible if **Local Catalog** is selected in the **Service and Credentials** area. *PINES catalogers should not use the local catalog option.*

Number searches

Title Control Number searches

Search OCLC title control or accession numbers without prefixes 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 a hyphen.

LCCN searches

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

UPC, music, and publisher number searches

UPC and music/publisher/distributor numbers (024 and 028 |a) are searchable in the UPC box. Enter numbers for an 028|a search as is. BBC MM112 and B0012026-02 for example. 024 searches should be entered without dashes. 00602537645985 for example.

Title, author, publisher and Publication Date searches.

Title, author, publisher and publication date are other available searches in the Z39.50 interface and search all fields coded for the search type in the OCLC MARC record. You can search partial or complete titles.

Publication dates can be searched as a range (1984-1990) or as a single date.

Combining search terms

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

Publication dates can be single, as in the above search or a range, such as 1984-1990.

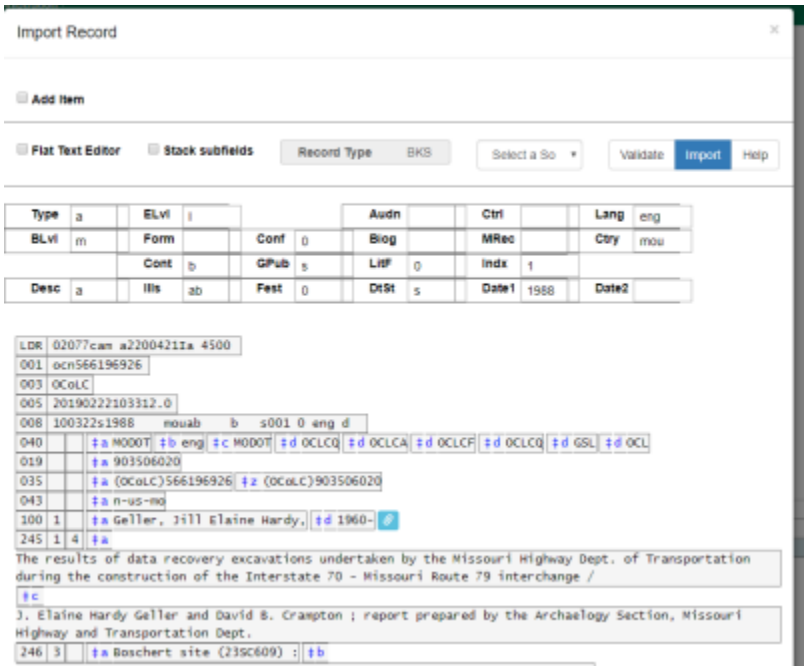
Importing OCLC Records from the Z39.50 Interface

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 the list of records returned, with your record highlighted, click on the **Edit then Import** button.

A new tab will open with the selected record in the **MARC Editor**.

Make any necessary edits to the MARC record as needed. When you are ready to import, click on the **Import** button.



The MARC Editor tab will redisplay the record in your chosen default view. You are now ready to add holdings as described above.

Best practice is to edit the record in the OCLC Connexion client before import.

Preventing importing duplicate records

Please keep in mind that the majority of 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 as an existing record TCN (title control number), you will get a warning that the record already exists. However, if the incoming record has a match in PINES but its TCN is not an ocm, ocn, or on 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 that does not contain an OCLC number based

TCN (see section on Overlaying title records).

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