



How to Maintain Holdings for Your Library Effectively and Efficiently

Answering questions in this checklist will help you decide which services are most efficient and effective for managing your library's holdings in WorldCat. You can mix and match online and offline services, use local holdings records to provide item-specific holdings information, and/or use customized cataloging or acquisitions services. Services for managing your library's holdings in WorldCat include the following:

- Connexion client
- Connexion browser
- CatExpress
- Z39.50
- OCLC Batch Processing
- eSerials Holdings
- WorldCat Cataloging Partners
- WorldCat Collection Sets
- GovDoc service
- CONTENTdm
- OCLC Contract Cataloging

For information about a service, go to <http://www.oclc.org/services/a-to-z.htm> and click a link, or click a link in the table rows below.

For help with holdings maintenance tools, contact OCLC Customer Support by phone at 1-800-848-5800 or by email at support@oclc.org. Support staff can answer questions about holdings maintenance, discuss holdings maintenance tools in terms of your library's needs, walk you through setting up a service, and more.

Checklist of questions and suggested solutions

Questions	Solutions
<p>Does your library have an OCLC cataloging subscription? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff time available for regularly maintaining holdings on individual records? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff familiar with MARC format? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff trained in using either or both Connexion client and browser? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using Connexion (client and/or browser interfaces).</p>
<p>Is Connexion client installed on staff computers? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If assistance from IT staff is needed to install Connexion client, is this assistance available? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your staff need to use sophisticated functions of Connexion client that are not in Connexion browser (for example, local files, macros, user-initiated batch)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Are staff trained and proficient with Connexion client, or are they available to attend training webinars? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using Connexion client.</p>
<p>Do you have support staff who are temporary or untrained in MARC format and/or in Connexion (for example, student workers or volunteers)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to one or both of these questions, consider using</p>

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<p>Do you have staff who only add and delete holdings (they do not edit records)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	CatExpress .
<p>Does your integrated library system (ILS) have a Z39.50 client? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your Z39.50 client support the “Z39.50-1995 Database Update Extended Service Definition” that allows you to return holdings online to OCLC? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff more familiar with your Z39.50 client than with Connexion? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using Z39.50 Cataloging.</p> <p>Note: If you answered No to the second question, use batchload to update your holdings for records you get using Z39.50.</p>
<p>Are there parts of your collection that have never had holdings set in WorldCat? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does WorldCat indicate that your library holds items that you no longer have? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you need OCLC control numbers for your local records to implement WorldCat Local or WorldCat Navigator? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider setting up a one-time Batch Processing project with Batch Services.</p>
<p>Do you create a large volume of original cataloging using your ILS rather than Connexion? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you receive bibliographic records from a vendor, but need to update your WorldCat holdings for these items? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you need to delete holdings from more than a few hundred records at a time? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider setting up an ongoing Batch Processing project with Batch Services.</p>
<p>Do you purchase part of your materials from one of the participating vendors listed at: http://www.oclc.org/us/en/catalogingpartners/wccp_partners.htm? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via the OCLC Electronic Data Exchange (EDX) using FTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff time limited for timely and regular updating of holdings on individual records for new acquisitions? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using WorldCat Cataloging Partners (WCP).</p>
<p>Do you have large electronic or microform sets that need bibliographic records? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via EDX using FTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using WorldCat Collection Sets.</p>

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<p>Does your library have electronic serials? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you use one of the supported serials management providers listed at: http://www.oclc.org/us/en/eserialsholdings/partners/default.htm? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Or</p> <p>Can you submit your data directly to OCLC using tab-delimited or Google Scholar data format?</p>	<p>If you answered Yes to both of these questions, consider using E-serials Holdings.</p>
<p>Is your library a regional or selective depository for U.S. government documents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your library lack the resources to catalog federal documents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via EDX using FTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using the GovDoc service.</p>
<p>Do you have materials to catalog that require expertise outside the scope of your staff expertise (for example, unfamiliarity with languages or material types)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Have you received gift collections that you do not have time to catalog? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have a cataloging backlog? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider using Contract Cataloging.</p>
<p>Do you want to maintain item-specific holdings for serials in WorldCat (for example, volumes and dates held)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you want to add information about your lending and reproduction policies for specific titles in WorldCat to better target resource sharing requests? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff trained in Z39.71 holdings standards? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff trained in MARC Format for Holdings? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff trained in using Connexion Browser? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using Local Holdings Maintenance in the Connexion browser.</p>
<p>Do you want to maintain item-specific holdings for serials in WorldCat (for example, volumes and dates held)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you want to add information about your lending and reproduction policies for specific titles in WorldCat to better target resource sharing requests? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have MARC Format for Holdings Data records in your ILS that you can send to OCLC? Or do you have patterned non-MARC holdings data? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have OCLC control numbers in these records? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider letting OCLC maintain your local holdings records using Local Holdings Record Updating service for batch processing.</p>

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<p>Does your library have unique digital collections—for example, local history archives, photos or slides, letters, maps, audio/video files—that are not yet discoverable through WorldCat?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to this question, consider using CONTENTdm.</p>

Notes



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