



# WorldCat Cataloging Partners User Guide



# **WorldCat Cataloging Partners User Guide**

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# About This Guide

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# Overview

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<b>Scope</b>	The <i>WorldCat Cataloging Partners User Guide</i> presents information about a collaborative relationship with materials vendors that delivers OCLC-MARC records to match the materials ordered through participating vendor partners and sets library holdings automatically in WorldCat. The <i>Guide</i> provides an overview of the service, procedures for using the service, and descriptions of how the service processes records.
<b>Audience for this Guide</b>	The <i>WorldCat Cataloging Partners User Guide</i> assumes a general knowledge of OCLC Cataloging services. The <i>Guide</i> can be used as an introduction to WorldCat Cataloging Partners (WCP), as an instruction manual for using WCP, and as a reference tool to answer questions about WCP.
<b>Ordering WorldCat Cataloging Partners</b>	You can order WorldCat Cataloging Partners through the OCLC Online Service Center.  For help completing the order form, contact your <a href="#">regional service provider</a> .
<b>Availability of this Guide</b>	This <i>Guide</i> is available on the OCLC Web site at <a href="http://www.oclc.org/support/documentation/promptcat/using/guide/">http://www.oclc.org/support/documentation/promptcat/using/guide/</a> .
<b>Typographic conventions</b>	In this <i>Guide</i> , data that you must enter exactly as shown appears in boldface type, for example, <b>pdn</b> . Data you need to supply appears in italic type in brackets, for example, <b>edx.pcat</b> . <i>[slc]</i> . Do <b>not</b> enter the brackets.
<b>Terminology</b>	WorldCat Cataloging Partners is the name of the new OCLC service formed by the merger of the OCLC PromptCat service and the Cataloging Partners program. You may see these names referred to in this Guide because not all older terms have been renamed.
<b>More information</b>	See the following sources for more information about WorldCat Cataloging Partners. The remaining documents are available at the OCLC Web site, at the address given.

Source	Description of Information
<a href="http://www.oclc.org/catalogingpartners/default.htm">OCLC WorldCat Cataloging Partners web site</a> < <a href="http://www.oclc.org/catalogingpartners/default.htm">http://www.oclc.org/catalogingpartners/default.htm</a> >	Information about using WorldCat Cataloging Partners vendor partners, and other information.
<a href="http://www.oclc.org/bibformats">Bibliographic Formats and Standards</a> < <a href="http://www.oclc.org/bibformats">http://www.oclc.org/bibformats</a> >	Definitions and descriptions of fields and subfields in OCLC-MARC records.
<a href="http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm">EDX User Guide</a> < <a href="http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm">http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm</a> >	Requirements and step-by-step procedures for sending files to or retrieving files from various OCLC services.
<a href="http://www.oclc.org/support/documentation/pdf/pswrefcard.pdf">Product Services Web Reference Card</a> < <a href="http://www.oclc.org/support/documentation/pdf/pswrefcard.pdf">http://www.oclc.org/support/documentation/pdf/pswrefcard.pdf</a> >	How to use OCLC Product Services via the World Wide Web.

## Overview (continued)

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<a href="http://www.oclc.org/support/documentation/worldcat/records/subscription/default.htm">OCLC-MARC Records</a> < <a href="http://www.oclc.org/support/documentation/worldcat/records/subscription/default.htm">http://www.oclc.org/support/documentation/worldcat/records/subscription/default.htm</a> >	Record and file specifications and lists of valid fields and subfields in OCLC-MARC records.
<a href="https://www3.oclc.org/app/promptcat_order/">WorldCat Cataloging Partners Order Form</a> < <a href="https://www3.oclc.org/app/promptcat_order/">https://www3.oclc.org/app/promptcat_order/</a> >	Contains information on specific ordering options.
PromptCat Listserv. For information on the listserv, including how to subscribe, see: < <a href="http://lists.luc.edu/listinfo/promptcat">http://lists.luc.edu/listinfo/promptcat</a> >	Ongoing discussion, current information, and support for WCP users. The listserv is maintained by Loyola University in Chicago.

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**OCLC Reviewers:** Robin Buser, Bob Pearson, Kristina Truthan, Maureen Huss, Renee Register, Tim Savage, Jenny Tweed, Julie Whitley

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# WorldCat Cataloging Partners

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**Introduction**

Use this chapter as an introduction or review of the features and functions of the OCLC WorldCat Cataloging Partners service.

## 1.1 Introduction to WorldCat Cataloging Partners

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**WorldCat Cataloging Partners** WorldCat Cataloging Partners (WCP) is a collaborative effort with materials vendors to reduce the cost of cataloging for libraries. WorldCat Cataloging Partners delivers OCLC-MARC records that match the materials you order through participating vendor partners and sets your library's holdings automatically in WorldCat.

**Three levels of service**

- **Basic.** The basic level of service provides automated copy cataloging. WCP delivers records that already exist in WorldCat, based on information from your materials vendors about the titles you've purchased. The basic service is included in your library's OCLC cataloging subscription price.

This level of service includes any automated functionality that was previously available through PromptCat, such as adding barcodes and acquisitions data (invoice number, invoice date, price, etc.) to records. It also includes an electronic label file of spine and pocket labels that can be delivered to you or your materials vendor for shelf-ready materials.

- **100 percent record delivery.** The 100 percent record delivery option offers a record for every title with a Library of Congress or Dewey Decimal Classification call number and at least one subject heading for all non-fiction titles. This option requires an additional fee, based on your library's OCLC cataloging activity.

- **Customized record delivery.** The customized record delivery option provides 100 percent record delivery and offers additional customized local editing performed by catalogers. This option also requires an additional fee, based on your library's OCLC cataloging activity.

**Pricing** WorldCat Cataloging Partners basic service is available as part of your OCLC Cataloging Subscription or CatExpress Subscription. A custom [delete?] quote for the 100 percent option is available through the Online Service Center, or by contacting your OCLC [regional service provider](#) or your OCLC sales representative. A custom quote for Customized Record Delivery is available from your OCLC [regional service provider](#) or your OCLC sales representative.

**Timing of set holdings** Holdings can be set in WorldCat as records are processed or after a delay of 1-180 days. You may use the delay to allow selectors time to evaluate items sent on approval or to allow materials to circulate among your patrons before ILL requests are received.

**Labels for shelf-ready items** WorldCat Cataloging Partners can provide customized spine and pocket labels that vendors affix to items so that the items come to you shelf-ready. WCP can also provide spine and pocket label records that you print and affix. Labels are provided at no extra cost.

## 1.1 Introduction to WorldCat Cataloging Partners (continued)

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**Shared local catalog options** Since WorldCat Cataloging Partners has access to the OCLC WorldCat holdings of all libraries in a shared local catalog, it can provide one record for the catalog while setting holdings for individual libraries.

**Item check in** The WCP Cataloging Report lists all titles (and other data) that are processed in a vendor manifest and describes the outcome of the processing. You match the items you receive (using the vendor's invoice or packing list) with the titles on the report.

**Data retrieval methods** WorldCat Cataloging Partners provides bibliographic records for your local system or shared local catalog via one or a combination of the following methods. The method or methods you use depend on local needs.

Method	Availability
OCLC Electronic Data Exchange (EDX) account	Via the Internet using an EDX account
OCLC Product Services Web	Via the Internet
Catalog cards	Card sets via mail

**Current approval plans and firm orders** With minor adjustments, you can use current approval plans. Some libraries use WCP implementation planning as an opportunity to examine current plans. Your current firm-order methods can remain the same. WCP works well with vendor electronic ordering systems.

**Institution records** WorldCat Cataloging Partners uses master records and adds local information for your library. Institution records of other institutions are not available through WorldCat Cataloging Partners.

## 1.2 WCP and Other OCLC Products and Services

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<b>Introduction</b>	Use WorldCat Cataloging Partners in conjunction with other OCLC products to enhance your cataloging efficiency. For more information, see the <a href="http://www.oclc.org">OCLC Web site</a> at < <a href="http://www.oclc.org/catalogingpartners/default.htm">http://www.oclc.org/catalogingpartners/default.htm</a> >
<b>OCLC Bibliographic Record Notification</b>	This service supplies upgraded and updated records automatically. Use it with WCP so that you can accept less-than-full-level records. Complete records are provided automatically when they become available. For details, see the <a href="http://www.oclc.org/bibnote/default.htm">Bibliographic Record Notification Web site</a> at < <a href="http://www.oclc.org/bibnote/default.htm">http://www.oclc.org/bibnote/default.htm</a> >.
<b>OCLC Contract Cataloging</b>	Another option for receiving 100 percent of your cataloging, at a lower cost than you might expect, is Contract Cataloging. Use it to catalog titles you purchase from vendors that do not participate in WorldCat Cataloging Partners, for a growing backlog, or for a gift collection. OCLC Contract Cataloging staff share your commitment to quality and attention to detail. For details, see the <a href="http://www.oclc.org/customcataloging/services/contract/default.htm">Contract Cataloging Web site</a> at < <a href="http://www.oclc.org/customcataloging/services/contract/default.htm">http://www.oclc.org/customcataloging/services/contract/default.htm</a> >.
<b>OCLC Connexion</b>	You can retrieve your records via EDX or the Product Services Web site and import them into OCLC Connexion to edit, perform authority work, or create labels. You can also import the label file into the OCLC Connexion client to edit and print labels.
<b>OCLC Label Program</b>	You or your vendor can use the OCLC Label Program to edit and print WorldCat Cataloging Partners label files. For details, see <a href="http://www.oclc.org/support/documentation/label/default.htm">http://www.oclc.org/support/documentation/label/default.htm</a> .
<b>WorldCat Selection</b>	This service allows selectors of new materials at your library to view notification records from multiple vendors in one central comprehensive system. With WorldCat Selection, you can easily get WorldCat records for newly purchased materials into your integrated library system earlier in the technical services process. Use WorldCat Cataloging Partners to provide updated cataloging records as materials are delivered to your institution or to set holdings in WorldCat once a purchase has been made.
<b>CIP Upgrade Program</b>	<p>OCLC, in cooperation with WCP vendors, upgrades Cataloging in Publication (CIP) records in WorldCat so that WCP delivers more full-level records to you.</p> <p>The CIP Upgrade Program updates CIP records in WorldCat as quickly as possible. There are two main components.</p> <ul style="list-style-type: none"><li>• In the CIP Upgrade Unit, OCLC catalogers work in cooperation with Blackwell's Book Services to identify new titles with CIP cataloging and upgrade the cataloging as soon as the books are available.</li><li>• Material vendors upgrade their CIP records and send them to OCLC to upgrade the WorldCat records.</li></ul>
<b>Vendor Record Contribution Program</b>	OCLC pursues relationships with vendors of library materials and bibliographic records for the contribution of bibliographic records to WorldCat. In particular, OCLC strives to enrich WorldCat with records for materials published outside the U.S. and for audiovisual and electronic materials. Consequently, these records are available to WCP libraries.

## 1.3 Ordering WorldCat Cataloging Partners

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### How to order

There are two ways to order WorldCat Cataloging Partners:

- Online Service Center: <http://www.oclc.org/servicecenter/default.htm>
- Web-based order form: [https://www3.oclc.org/app/promptcat\\_order/](https://www3.oclc.org/app/promptcat_order/)

For help filling out the order form, contact your [regional service provider](#).

### Who sets up your profile

Those involved in setting up your WorldCat Cataloging Partners profile may include:

- Institution staff
- OCLC staff
- OCLC regional service provider staff
- Materials vendors
- Local system vendors

### Online service center

If you already have an Online Service Center account, use it to order WorldCat Cataloging Partners. If you do not have an account, you can create one.

The Online Service Center can provide a quote for the 100 percent option.

If there are options you would like that are not on the order form and are not available in the basic or 100 percent levels, contact your [regional service provider](#) or OCLC to discuss the custom option.

### Web-based order form

A web-based order form is available for libraries that are:

- Outside the US
- Unable to complete the order form in the Online Service Center
- Unable to use the shared local cataloging option

The web-based form is here: [https://www3.oclc.org/app/promptcat\\_order/](https://www3.oclc.org/app/promptcat_order/)

### Activating your profile

You will be notified when your WorldCat Cataloging Partners profile is activated.

Order method	When profile is activated
Online service center	Upon submitting order
Web-based form	Up to two weeks after submitting form

## 1.4 Shared Local Catalog Options

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<b>Introduction</b>	This section describes the options available to libraries that are members of a shared local catalog and that want to be treated as members of a shared local catalog.
<b>Shared local catalog</b>	Shared local catalogs are local systems that are shared by more than one institution with separate OCLC symbols. One OCLC symbol with separate holdings library codes, used in the 049 field, is not considered a shared local catalog. If you are named as a member of a shared local catalog by another library, then you must also be profiled as a member of the shared local catalog group.
<b>Profile as a member of a group</b>	To profile as a member of a group, fill out the shared local catalog section of the order form. Use the same name for the shared local catalog that other WCP libraries in your shared local catalog have used. If you have questions, contact your <a href="#">regional service provider</a> .
<b>Benefit of using shared local catalog options</b>	The primary benefit of using the shared local catalog option is that you will receive only one record for your shared local system, with holdings set for your institution on the WorldCat record.
<b>Shared local catalog options</b>	<p>The following options are available to libraries that are members of a shared local catalog:</p> <ul style="list-style-type: none"><li>• You can choose to not receive records if holdings are already set for any institution in your shared local catalog. You can also choose to receive a Partnering Data Record (PDR) with or without the OCLC control number or local holdings information.</li><li>• Even if your institution chooses not to receive bib records (because another partner library already has holdings set or because your holdings were previously set) you can choose to receive spine and pocket labels.</li></ul>
<b>Ordering shared local catalog options</b>	Each library in a shared local catalog must fill out a separate order form. The form to use is the PromptCat form: <a href="https://www3.oclc.org/app/promptcat_order/">https://www3.oclc.org/app/promptcat_order/</a>

## 1.5 Record Selection

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### Automated processing

The following is a summary of how WCP processes data for the basic service:

	Action
1	OCLC and vendors establish record format standards, technical requirements, and processing schedules.
2	The vendor sends WCP a vendor manifest that contains bibliographic data about the titles ordered.
3	WCP uses ISBN, UPC, or Publisher Number (from the 028 field) from the vendor's bibliographic data to determine the matching WorldCat records. Potential matches are validated by comparing the record format. If more than one WorldCat record with different cataloging sources is matched, WCP records all matches. If there are no matches, WCP uses OCLC's Duplication Detection and Resolution (DDR) program to try to find a match.
4	WCP creates the Vendor Inventory Database (VID) that links the Vendor control number and the OCLC control number of the WorldCat record. The cataloging source of the matching record is also recorded. Future manifests check the VID before matching to see if a match was made in the past.
5	The vendor sends items to the library. WCP retrieves the matching WorldCat record. If more than one record was matched, WCP follows a hierarchy of sources to determine which record to deliver. For most libraries, including those new to WCP, records with a source of DLC are chosen first. If there are no matches, WCP reports the Vendor control number and title on your Cataloging Report and creates a Partnering Data Record (PDR), if you are so profiled.
6	WCP compares the WorldCat record with your selection rules and checks whether your holdings are already set. The holdings check avoids duplicate records. For libraries in shared local catalogs, WCP also checks holdings set for other members of your shared catalog. If the record does not satisfy your selection rules or holdings are already set, WCP reports the Vendor control number and title on your WCP Cataloging Report and/or creates a PDR (if you are so profiled). Alternatively, you may choose to receive a record even though your holdings (or those of a member of your shared local catalog) are already set in order to get the latest version of the OCLC master record.
7	If the record satisfies your rules, WCP adds data to your records and: <ul style="list-style-type: none"> <li>• Adds the record to the file of records it provides to you</li> <li>• Creates a label record (if you are profiled for labels) and adds the record to the file of label records it provides to your vendor or to you</li> <li>• Sets holdings immediately or sets after the delay you choose</li> <li>• Creates an archive record regardless of your holdings option (immediate or delayed)</li> <li>• Adds the requisite information to your WCP Cataloging Report</li> </ul>

**Record selection rules** For items you receive by approval plan or firm order, WCP retrieves the matching WorldCat record and checks it against the following record selection rules that you define:

- Encoding level
- Cataloging source

## 1.5 Record Selection (continued)

Libraries choosing the 100 percent or custom options are automatically set to receive all encoding levels and cataloging sources.

**Encoding level rule** WCP determines whether the record meets your Encoding level selection rule based on your choice of Encoding levels in the table below.

Encoding level
All
CIP (8)
FULL (Blank, 1, I, L, 4)
Not FULL (7, 5, 2, K, M)
Other

**Cataloging source rule** WCP determines whether the record meets your Cataloging source selection rule based on whether one of the following elements is in Srce (Source), field 040, or field 042 (Authentication code):

Your selection rule	Code in Srce, 040, 042
All	All of the following
LC	040 ‡a contains DLC (either alone or in combination with another symbol. e.g., DGPO/DLC, DLC/ followed by anything else, DLC- followed by anything else or /DLC at the end of subfield ‡a) 040 ‡c contains DLC Cataloging Source (Srce) is c 042 ‡a contains lcode, lccopycat, lccopycat-nm, lcode, lcnccp, premarc, lcac, lc, lcd, msc, nsdp or nst.
NLM	040 ‡a contains NLM
UKM	040 ‡a contains UKM
Other	All valid codes in Srce 040 or 042 that do not fall under the above definitions of DLC, NLM, or UKM

**No record delivered or no record found** In addition to listing titles for which you receive a record, the WCP Cataloging Report also lists items for which no record was delivered and/or no matching WorldCat record was found. The table below gives some common examples of such situations.

Item Listed as	Because
Record found, but not delivered	Item matches a WorldCat record but does not meet your selection rules
Record found, not delivered	Holdings already set
No record found	No WorldCat record matches the item

## 1.5 Record Selection (continued)

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### Report mismatches

If you find a mismatch (a record that does **not** match the item), use the following procedure:

	Action
1	If the holding on the record is delayed, go to step 4. If the holding is set immediately, log on to OCLC Cataloging and find the mismatched bibliographic record in WorldCat.
2	Delete your holdings using the Delete holdings command.
3	Find the correct record in WorldCat and set your holdings using Update.
4	Report the mismatch to OCLC by filling out the Mismatch/No Match report on the Web: <a href="https://www3.oclc.org/app/pcmismatch/">https://www3.oclc.org/app/pcmismatch/</a> .
5	If correcting a record set holdings delay, you must wait until your holdings appear before you can delete holdings. If you are using Connexion client, you can delete your holdings in batch.

**Note:** The Delete holdings command is a credit.

### Partnering data record

WCP can produce a Partnering Data Record (PDR) to carry vendor data when a full record is not delivered or not found. A PDR can also be delivered in place of a record when another institution in your shared local catalog has already received the record. The PDR can include the OCLC number when the record is matched but not delivered.

The PDR contains an 019 field if one is present in the master record. The 019 field allows you to match existing records in your local system that have been merged into other records in WorldCat.

The table below lists the data in the PDR by field.

Field	Data
001 Byte 0-2	pct
001 Bytes 3-10	PDR entry number
019	019 of master record, if any
020	ISBN from vendor manifest
245	Title from vendor manifest
Local fields	All vendor-provided data and notes, as profiled

## 1.6 Data Added to Records

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### Introduction

After record selection, data is added to the record. The materials vendor provides the data to WCP on the vendor manifest. WCP supplies other data based on the WCP Order forms. Using WCP Order forms, the following parties define the data to be added to records:

- OCLC has defined many types of data that can be added to your records
- Your materials vendor has defined types of local data that can be sent to WCP to be added to your records
- Your local-system vendor has created load tables that define the types of local data that is needed in your records and where the data should appear
- You decide what data to add to your records

### Data in records accepted by local systems

All WCP processed records, regardless of delivery method, contain data that differs from other OCLC-MARC records. Your local system must accept the following data in the following fields:

Data	Contents
001 Byte 0–2	<b>Partnering Data Records only.</b> Contains <b>pct</b> . Identifies that the number following is a Partnering Data Record number.
001 Bytes 3–10	<b>Partnering Data Records only.</b> Contains Partnering Data Record number: a PDR entry number, right justified with leading zeros.
Local fields	You, each materials vendor, and your local system vendor define local fields and the data in them.

### Vendor-provided data

WCP defines data elements that vendors can send on manifests in coded form. WCP adds this data to fields of your records based on your WCP profile. The following are types of vendor-provided data that WCP can add to records:

- Invoice data
- Bibliographic data
- Processing data

### Limits on vendor-provided data

Consult your vendors to determine what each provides.

### User-defined data

You determine what data WCP adds to your records. WCP can:

- Add holding library code
- Copy the call number to a local field
- Add data strings

### Notes

Notes are subfields that you would like to have added to records. The most common data string adds a 599 note that indicates the record came from WCP. Another

## 1.6 Data Added to Records (continued)

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common practice is to use data strings to add codes that are required by your local system. Location codes are also added as data strings.

You define the data strings. You may profile up to four data strings that can contain multiple adjacent subfields.

### **Other local data**

Other local data can be added to your records as needed through the Custom option. Record customization that cannot be completed by the automated processes of the Basic Service can be completed by catalogers for those libraries that have requested the Custom option.

## 1.7 Dewey Options

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**Introduction** This section describes the Dewey® options available to libraries when setting up their basic or 100 percent profiles.

**Dewey class length** The list below contains the Dewey options that determine how much of the Dewey classification number you use for your local call number.

- First three numbers (up to the decimal point)
- Up to the first slash (prime)
- Use entire Dewey class number
- Choose the number of characters past the decimal point

**Dewey cutter type** The list below contains the Dewey options that determine which Dewey cutter type you use for your local call number. The text cutter is the first 1-8 characters of the main entry.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

**Dewey text cutter** The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-8 characters of the first word of the main entry. You choose the number of characters.

Number of characters	Text cutter
1-8	From first word of main entry
More than 8	First 8 characters (100 or 245)

**Dewey workmark** WCP can add a title workmark to your Dewey call number. The first letter of the title in field 245 is added to the call number at the end of the cutter. The workmark will be in the same case (usually upper) as the first letter of the title.

**Biography Type codes** The list below contains the Type codes that determine whether an item is coded as a biography.

Type: a, Biog: a, b, or c

or

Type: i, LTxt: a, or b

**Biography call number text** WCP can provide a Biography call number instead of a classification number for titles that are coded as biographies. For example, a Biography call number may be: 092 Bio Ꞥb Lincoln. You must supply the text for the 092 Ꞥa in your profile.

## 1.7 Dewey Options (continued)

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**Biography cutter type** The list below contains the Dewey options that determine which biography cutter type you use for your local call number. The biography text cutter is 1-8 characters of the first word of the first 600 field.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

**Biography text cutter** The list below contains the Dewey options that determine which biography text cutter type you use for your local call number.

Number of characters	Text cutter
1-8	From first word of first 600 field
More than 8	First 8 characters (600)

**Fiction Type codes** The list below contains the Type codes that determine whether an item is coded as fiction.

Type: a, LitF: 1, f, or j

or

Type: i, LTxt: f

**Fiction call number text** WCP can provide a Fiction call number instead of a classification number for titles that are coded as fiction. For example, a Fiction call number may be: 092 Fic Ꞥb Wilder. You must supply the text for the 092 Ꞥa in your profile.

**Fiction cutter type** The list below contains the Dewey options that determine which Fiction cutter type you use for your local call number. The text cutter is the first 1-8 characters of the main entry.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

**Fiction text cutter** The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-8 characters of the first word of the main entry

Number of characters	Text cutter
1-8	From first word of main entry
More than 8	First 8 characters (100 or 245)

## 1.7 Dewey Options (continued)

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### Juvenile codes

The list below shows how WCP defines juvenile materials.

- If fixed field Audn contains values a, b, c, d, or j
- If another code appears in field Audn, but field 082 contains [E]
- If any 6xx field has a second indicator 1 or a subfield Ꞥv containing **Juvenile literature**

### Juvenile prefix for non-fiction

For titles that are non-fiction, and are coded as juvenile, WCP can add a prefix to the call numbers. You can choose the prefix. The most common are j, Juv, and YA.

### Juvenile fiction call number text

WCP can provide a juvenile fiction call number instead of a classification number for titles that are ordered as juvenile. For example, a juvenile fiction call number may be: 092 Juv Ꞥb Wilder. You must supply the text for the 092 Ꞥa in your profile.

### E in place of Juvenile fiction text

If the 082 field in the matched MARC record contains E, WCP can place an E in the 092 field instead of the juvenile fiction text for titles that are coded as Juvenile fiction. For example: 092 E Ꞥb Avery

### Juvenile fiction cutter type

The list below contains the Dewey options that determine which juvenile fiction cutter type you use for your local call number. The text cutter is the first 1-8 characters of the main entry.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

### Juvenile fiction text cutter

The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-8 characters of the first word of the main entry.

Number of characters	Text cutter
1-8	First word of main entry
More than 8	First 8 characters

## 1.8 Label Production

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**Introduction** WCP can create a label record for each item sent by the vendor. WCP posts a file of label records to an EDX account or at the Product Services Web site. You or your vendor retrieve the file of label records and then print and affix labels to items. You can also produce labels locally if you import records into the Connexion client or use the OCLC Label Program.

**Label content** You define the label content, which consists of:

- Location
- Call number format
- Arrangement of data for labels

**Labels and prefixes** If you are profiled to have a prefix (such as J, YA, or Juv) added to the call number in the record, the prefix will also appear on your spine and pocket labels as Location Text.

**Methods of label record file retrieval** WCP makes the label record file available at an EDX account and on the Product Services Web site.

**Label printing** Use the [Cataloging Label Program](http://www.oclc.org/label/) (<http://www.oclc.org/label/>) or [Connexion client](http://www.oclc.org/connexion/interface/client) (<http://www.oclc.org/connexion/interface/client>) to print labels efficiently. These programs are available from OCLC at no charge. Most commercially available label printing programs can also print WCP labels.

**Label format** Label records in the label file can print in the following formats:

<b>Spine Label 6 (sl6).</b> 1 spine label and 2, 6-line pocket labels.
<b>Spine Label B (slb).</b> 1 spine label and 1, 4-line pocket label.
<b>Coded generic.</b> Some vendors use a coded generic format to print labels that meet your customized specifications. The Cataloging Label Program and Connexion client do not print coded generic labels.

These labels can be imported into the Cataloging Label Program or Connexion client in these label formats: sl6, slb, sp1 and sp4.

**Pocket label title truncation** For Spine Label 6 (sl6) and Spine Label B (slb) pocket labels, the printed line limit for the title is 2 lines of 28-characters each. To ensure this limit and to ensure no blank lines appear on the pocket label, WCP uses the following process to determine where to split the title into 2 lines:

	Action
1	Fills up to 28 spaces available for the first line with the title, including characters and spaces between words.
2	Moves back to the first space it finds and breaks the title.
3	If no space is found, moves back to within 4 characters of the beginning of the title and breaks the title.

## 1.8 Label Production (continued)

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<b>Spine label character limit</b>	For Spine Label 6 (sl6) and Spine Label B (slb) formats, each line has a maximum of 8 characters. If, after formatting the call number, a line exceeds 8 characters, WCP places the extra data on the next line.
<b>Label records not created</b>	<p>WCP may provide a bibliographic record, but produce a placeholder label record when:</p> <p>The bibliographic record has no call number for the 4-character holding library code's defined classification scheme.</p> <p>The bibliographic record also has an alternative call number, that is, multiple subfields <math>\dagger a</math> in field 050, 060, 090, or 096.</p> <p>Adding vendor-provided or user-defined data makes the call number exceed its printing line limit. The printing line limit for Spine Label 6 (sl6) is 15. The line limit for Spine Label B (slb) is 9.</p>
<b>Match labels to items</b>	WCP places label records into the label file in the same order as the titles appear on vendor manifests. If WCP cannot create a label record, a placeholder label record with the text <i>No Label</i> is created. After printing a file of label records, you or the vendor attach the printed labels.
<b>Multiple labels</b>	You can edit and print multiple copies of labels using the Cataloging Label Program or Connexion client. Some vendors can supply multiple label records as needed.
<b>Vendor labels</b>	Several materials vendors can use the WCP label file to create labels and affix them to materials before sending them to you. If you are interested in this option, contact your materials vendor.
<b>Labels for custom profiles</b>	Libraries with a WCP custom option profile receive labels that are created after the catalogers complete the custom cataloging. These labels can be delivered to the library or to the library's material vendor.

# Using the WCP Cataloging Report

## In this chapter

This chapter contains the following topics:

<b>Subject</b>	<b>Page</b>
2.1 Overview of the WCP Cataloging Report	2:2
2.2 Example of the WCP Cataloging Report	2:3
2.3 Description of the WCP Cataloging Report	2:5

## Introduction

Use this chapter to learn how to use the WorldCat Cataloging Partners Cataloging Report to manage your WCP account.

## 2.1 Overview of the WCP Cataloging Report

---

**Introduction** You can check items on the WorldCat Cataloging Partners Cataloging Report against invoices and packing lists from vendors. The report provides statistics, lists all titles, and describes how titles are treated by WCP.

**Access** You retrieve the WCP Cataloging Report from your EDX account and/or the Product Services Web site.

**Posting frequency** WCP posts the report when it produces a file of records. WCP can produce and post records as frequently as every day.

**WCP Cataloging Report** The WCP Cataloging Report has the following parts:

Part	Description
Grand summary	Compiles information for all the invoices in the report. Lists the number of invoices, total titles sent, date for holdings set, label production status, and so forth.
Invoice summary	For each invoice listed in the Grand summary, the report has an Invoice summary. It includes summary data as in the Grand summary, but specific to one invoice. Each Invoice summary also has the following sections: <ul style="list-style-type: none"><li>• <b>Records Matched, Records Delivered.</b> A title list of records matched and sent. It includes characteristics of the record, for example, vendor control number, call number, cataloging source, encoding level, series indicator, and label production indicator.</li><li>• <b>Records Matched, No Records Delivered.</b> A title list of items for which a record matched but for which no bibliographic record was sent. It includes why the record was not delivered and any vendor-provided data for the item from the vendor manifest.</li><li>• <b>No OCLC Record Found.</b> A title list of items for which no record was found. It includes vendor-provided data for the item from the vendor manifest.</li><li>• <b>Shared Local Catalog, Records Not Delivered.</b> A title list of items for which a record matched, but for which no bibliographic record was sent because the record already had holdings set for another member of the shared local catalog. It includes vendor-provided data for the item from the vendor manifest.</li></ul>

**Type of software to use with the report** The WCP Cataloging Report is an ASCII file that you can use with word processing software, for example, Microsoft Word® or WordPerfect®.

**Sort order** The WCP Cataloging Report is sorted alphabetically by title under each invoice.

## 2.2 Example of the WCP Cataloging Report

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### Introduction

This section contains an example of the WCP Cataloging Report. The format has been altered to fit this page. The WCP Cataloging Report represents items processed from vendor manifests, which closely match packing lists and invoices sent to you. The report and the invoices or packing lists, however, may **not** have one-to-one correspondence. **Note:** The WCP Cataloging Report has not yet been renamed, and continues to be titled "PromptCat Cataloging Report."

OCLC ONLINE COMPUTER LIBRARY CENTER, INC.                      DATE: 2003-03-02  
PROMPTCAT CATALOGING REPORT

#### GRAND SUMMARY

DATE PROCESSED:			2003-01-31		
INSTITUTION:			PROMPTCAT UNIVERSITY		
VENDOR:			LIBRARY MATERIALS ARE <u>US</u>		
INVOICE NUM	INV DATE	ITEMS	INVOICE NUM	INV DATE	ITEMS
668867	2003-03-02	9	668868	2003-03-02	30
668869	2003-03-02	30	668870	2003-03-02	3
TOTAL INVOICES:			4		
TITLES SENT:			72		
RCDS MATCHED, PROD DELIVERED:			64		
RCDS MATCHED, NO PROD DELIVERED:			5		
SHRD LOC CAT, RCDS NOT DELIVERED:			2		
NO OCLC RECORD FOUND:			1		
NO SITE ID:			0		
LABELS PRODUCED:			64		
NUMBER OF ERRORS:			0		
DATE HOLDINGS SET:			2003-03-02		

OCLC ONLINE COMPUTER LIBRARY CENTER, INC.                      DATE: 2003-03-02  
PROMPTCAT CATALOGING REPORT

#### INVOICE SUMMARY

DATE PROCESSED:		2003-03-02
INSTITUTION:		PROMPTCAT UNIVERSITY
VENDOR:		LIBRARY MATERIALS ARE <u>US</u>
VENDOR INVOICE NUMBER:	668867	2003-03-02
TITLES SENT:		9
RCDS MATCHED, RCDS DELIVERED:		3
RCDS MATCHED, NO RCDS DELIVERED:		3
SHRD LOC CAT, RCDS NOT DELIVERED:		2
NO OCLC RECORD FOUND:		1
NO SITE ID:		0
LABELS PRODUCED:		3
NUMBER OF ERRORS:		0

## 2.2 Example of the WCP Cataloging Report (continued)

### RECORDS MATCHED, RECORDS DELIVERED DETAIL LINES

TITLE	OC LC NUM	VENDOR CONTROL NUM	CALL NUM	SRC	EL	TYP	SER	LBL
Aging and biography :	032395961	A00912136	HQ799.95	DLC		a	N	Y
Development in the Third World :	033078550	A00953142	HC59.7	DLC		a	N	Y

### RECORDS MATCHED, NO RECORDS DELIVERED DETAIL LINES

TITLE	OC LC NUM	VENDOR CONTROL NUM	CALL NUM	SRC	EL	TYP	SER	LBL
The collected speeches of Margaret Thatcher /	035758292	A01090162	DA591.T47	DLC	8	a	N	
INSTITUTION NOT PROFILED FOR THIS ENCODING LEVEL								
945	668867\$b1998-03-02\$c35\$g1\$iPromptCat							
Design and analysis of experiments /	036183569	A01265040	QA279	WAU	I	a	Y	
INSTITUTION NOT PROFILED FOR THIS CATALOGING SOURCE								
945	668867\$b1998-03-02\$c190\$g1\$iPromptCat							
Uprising :	032821675	A00933465	HV6439.U7	DLC		a	N	
HOLDINGS ALREADY SET FOR THIS INSTITUTION								
945	668867\$b1998-03-02\$c190\$g1\$iPromptCat							

### NO OCLC RECORD FOUND DETAIL LINES

TITLE	VENDOR CONTROL NUM	ISBN
SPANISH ARTISTS FROM THE FOURTH TO THE TWE	A00801676	0816106568
946	\$i3183114612093	
947	\$aA00801676	
948	\$aTRN\$bTRN34\$c34\$dFORM\$f1996-01-18\$1140\$m20\$n140\$q1\$t650733\$v1996-01-30	

### SHARED LOCAL CATALOG RECORDS NOT DELIVERED DETAIL LINES

TITLE	OC LC NUM	VENDOR CONTROL NUM	CALL NUM	SRC	EL	TYP	SER	LBL
Art and the Greek city state:	039157407	A01333025	DF221.C6	DLC		a	Y	
Nomadic voices of exile:	040218700	A01411181	PQ3988.5.N6	DLC		a	N	

## 2.3 Description of the WCP Cataloging Report

The following table describes the elements in the **Grand summary**:

Element Name	Description
DATE PROCESSED	The date WCP processed the vendor manifest.
INSTITUTION	The institution name.
VENDOR	The vendor name.
INVOICE NUM	Invoice Number. The vendor assigned invoice number.
INV DATE	Invoice Date. The date the vendor created the invoice.
ITEMS	Items. The number of titles in the invoice.
TOTAL INVOICES	The number of invoices in the report.
TITLES SENT	The total number of titles from all invoices.
RCDS MATCHED, PROD DELIVERED	Records matched, products delivered. The number of records delivered.
RCDS MATCHED, NO PROD DELIVERED	Records matched, no products delivered. The number of records that matched a WorldCat® record but for which <b>no</b> record was delivered.
SHRD LOC CAT RCDS NOT DELIVERED	The number of records that matched a WorldCat record, but which were not delivered because another library in the shared local catalog had holdings attached.
NO OCLC RECORD FOUND	The number of items for which no matching WorldCat record was found.
NO SITE ID	The number of titles that did not have a collection ID (usually location or fund code) in the vendor manifest, which means they could not be processed.
DATE HOLDINGS SET	The date on which holdings are set for all the titles in the report.
LABELS GENERATED	The number of label records generated for all invoices. <b>Note:</b> Placeholder label records are <b>not</b> counted.
NUMBER OF ERRORS	The number of items on the vendor manifest that could not be processed.

The following table describes the elements of the **Invoice summary**:

Element Name	Description
DATE PROCESSED	The date WCP processed the vendor manifest.
INSTITUTION	The institution name.
VENDOR	The vendor name.
VENDOR INVOICE NUMBER	The identifying number assigned by the vendor. (The invoice number on your vendor invoice matches this number.)
TITLES SENT	The number of titles for this invoice.
RCDS MATCHED, RCDS DELIVERED	Records matched, records delivered. The number of records delivered.
RCDS MATCHED, NO RCDS DELIVERED	Records matched, no records delivered. The number of records that matched a WorldCat record but for which <b>no</b> record was delivered.

## 2.3 Description of the WCP Cataloging Report (continued)

Element Name	Description
SHRD LOC CAT RCDS NOT DELIVERED	The number of records that matched a WorldCat record, but which were not delivered because another library in the shared local catalog had holdings attached.
NO OCLC RECORD FOUND	The number of items for which no matching WorldCat record was found.
NO SITE ID	The number of titles that did not have a collection ID (usually location or fund code) in the vendor manifest, which means they could not be processed.
LABELS GENERATED	The number of label records generated for all invoices. <b>Note:</b> Placeholder label records are <b>not</b> counted.
NUMBER OF ERRORS	The number of items on the vendor manifest that could not be processed.

The table below describes the detailed elements of **Records Matched And Delivered/No Records Delivered/ Shared Local Catalog Records Not Delivered:**

Element Name	Description
TITLE	The title taken from field 245 (Title Statement) subfield Ꞥa of the WorldCat record.
OCLC NUM	OCLC Number. The OCLC control number of the record delivered for the title.
VENDOR CONTROL NUM	Vendor control number. The unique number assigned by the vendor for the title.
CALL NUM	Call number. The Library of Congress, National Library of Medicine, or Dewey® call number (from subfield Ꞥa of the call number field). If you do <b>not</b> have an OCLC Cataloging Profile, you do <b>not</b> have call numbers listed.
SRC	Cataloging source. The agency that created the record. Taken from field 040 (Cataloging Source) subfield Ꞥa of the WorldCat record.
EL	Encoding level. The encoding level of the record. Taken from ELvl (Encoding Level) in the fixed field of the WorldCat record.
TYP	Record type. The type of material: Books, Scores, Sound Recordings, Visual Materials, Maps, or Computer Files. Taken from Type (Type of Record) in the WorldCat record.
SER	Series. <b>Y</b> indicates the title is a series. <b>N</b> indicates it is not. <b>Y</b> indicates that the WorldCat record has field 400, 410, 411, 440, or 490 (with indicator value 1).
LBL	Label. Indicates if a label has been generated for this title. <b>Y</b> indicates a label record was generated. If the space is blank, no label was generated.
STATUS	For <b>Records matched, records delivered</b> area, gives additional information when needed. For <b>Records matched, no records delivered</b> area, explains why no record was delivered.

## 2.3 Description of the WCP Cataloging Report (continued)

The table below describes the **status messages**:

Status Message	Description
INSTITUTION NOT PROFILED FOR THIS CATALOGING SOURCE	The record matching this title has a cataloging source that your profile indicates you do not wish to receive.
INSTITUTION NOT PROFILED FOR THIS ENCODING LEVEL	The record matching this title has an encoding level that your profile indicates you do not wish to receive.
HOLDINGS ALREADY SET FOR THIS INSTITUTION	Your holding symbol was already attached to the matched record and your profile indicates you do not wish to receive a record.
SHRD LOC CAT RCDS NOT DELIVERED	The holding symbol of an institution that shares your local catalog was already attached to the matched record and your profile indicates you do not wish to receive a record.
RECORD DELIVERED, BUT THE FOLLOWING FIELDS WERE TRUNCATED	The record had to be truncated. The truncated fields are listed.
DUPLICATE OCLC NUMBER	The matched record was already delivered in this manifest.
<b>Note:</b> Following the Title, Vendor control number, and International Standard Book Number (ISBN) is other vendor-provided data for the title from the vendor manifest.	

The table below describes the elements of **No OCLC Record Found Detail Lines**:

Element Name	Description
TITLE	Short title taken from vendor manifest.
VENDOR CONTRL NUM	The Vendor control number for a title.
ISBN	International Standard Book Number. ISBN taken from vendor manifest.
<b>Note:</b> Following the Title, Vendor control number, and International Standard Book Number (ISBN) is other vendor-provided data for the title from the vendor manifest.	



# Retrieving Data

This chapter contains the following topics:

<b>Subject</b>	<b>Page</b>
3.1 Overview of Data Retrieval	3:2
3.2 Access Your EDX Account for Shared Local Catalogs	3:4
3.3 Using Connexion with WCP Records	3:5

## Introduction

Use this chapter if you retrieve bibliographic records, label records, and the WorldCat Cataloging Partners (WCP) Cataloging Report via

- Standard File Transfer Protocol (FTP) from an EDX account
- Product Services Web

## 3.1 Overview of Data Retrieval

---

<b>Introduction</b>	The OCLC WorldCat Cataloging Partners service (WCP) provides two methods for Internet data retrieval: your EDX account (which uses standard FTP) and the Product Services Web site.
<b>Product Services Web</b>	For information on using the Product Services Web, see the <a href="http://www.oclc.org/support/documentation/batchprocessing/using/productservices/default.htm">Product Services Web Quick Reference</a> at < <a href="http://www.oclc.org/support/documentation/batchprocessing/using/productservices/default.htm">http://www.oclc.org/support/documentation/batchprocessing/using/productservices/default.htm</a> >.
<b>EDX account</b>	<p>An EDX account allows you to retrieve the following files and reports:</p> <ul style="list-style-type: none"><li>• Bibliographic record files</li><li>• Label record files</li><li>• WCP Cataloging Report</li></ul> <p>If you choose EDX as a delivery method when ordering WorldCat Cataloging Partners (WCP), you are automatically given an EDX account.</p>
<b>Combining methods</b>	You can use one or a combination of methods to retrieve bibliographic record files, label record files, and your WCP Cataloging Report. For example, you may retrieve bibliographic records from your EDX account and your WCP Cataloging Report from Product Services Web.
<b>Posting frequency</b>	WorldCat Cataloging Partners can produce and post record and label files and reports as frequently as every day.
<b>Posting notification</b>	You can request that WorldCat Cataloging Partners notify you by e-mail when it posts files to your account.
<b>File availability</b>	<p>You can retrieve files any time of day except for the following:</p> <p>Monday through Saturday, 2:00 am to 3:00 am U.S. Eastern Time</p> <p>Sunday 2:00 am to 6:00 am U.S. Eastern Time</p>
<b>File longevity after posting</b>	Bibliographic record files, label record files, and WCP Cataloging Reports remain posted for 90 days. Label files and Cataloging Reports are only archived for one year (files older than one year are not retrievable). Bibliographic record files are archived and retrievable through the Bibliographic Record Snapshot service. For more information, contact your <a href="http://www.oclc.org/contacts/regional/">OCLC regional service provider</a> at < <a href="http://www.oclc.org/contacts/regional/">http://www.oclc.org/contacts/regional/</a> >.
<b>Vendor-label file availability</b>	Vendor label record files are available only from the vendor's EDX account so the vendor can affix labels to your items. Vendors <b>cannot</b> access your EDX account to retrieve labels. Vendors have no access to your WCP records or reports.

## 3.1 Overview of Data Retrieval (continued)

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### Summary of WCP data retrieval methods

The table below describes the WCP data retrieval methods. Due to the size of record and label files, standard FTP is usually the most efficient retrieval method. For information on using the EDX service, see the [EDX User Guide](http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm) at: <http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm>.

<b>Data Retrieval Method</b>	<b>Access Method</b>	<b>Authorization and Password</b>	<b>Retrievable Data</b>
EDX	Standard FTP	EDX	<ul style="list-style-type: none"><li>• WCP Cataloging Report</li><li>• Label record files</li><li>• Bibliographic record files</li><li>• PDRs</li></ul>
Product Services Web	Web access only	Any OCLC authorization and password	<ul style="list-style-type: none"><li>• WCP Cataloging Report</li><li>• Label record files</li><li>• Bibliographic record files</li><li>• PDRs</li></ul>

## 3.2 Access Your EDX Account for Shared Local Catalogs

### Shared local catalog EDX accounts

When shared local catalog administrators retrieve records via EDX for multiple libraries, the member libraries are usually set up with an EDX account for their shared local catalog.

In order for a shared local catalog administrator to have access to the records of a member library, a Third Party Vendor form must be filled out by the library and the third party. For more information, contact your [regional service provider](#).

### File names for shared local catalog EDX accounts

The table below describes the file names for shared local catalog EDX accounts:

File Name	Note
<b>edx.pcat.[slc].rcd.[ven].d[yymmdd]</b>	<i>slc</i> is the symbol for the institution that administers the shared local catalog. <i>ven</i> is the symbol for the vendor partner who provided manifest.
Example: <b>edx.pcat.ihl.rcd.btx.d030809</b>	

### File sort order for shared local catalog EDX accounts

File names in shared local catalog accounts are sorted first by shared local catalog symbol, then by vendor symbol, and then by date.

Shared Local Catalog Symbol	Vendor Symbol	Date
<b>edx.pcat.ihl.rcd</b>	.btx	.d030801
	.btx	.d030809
	.ydx	.d030729
	.ydx	.d030805
<b>Note:</b> <i>ihl</i> is the shared local catalog symbol.		

### Reports for shared local catalog EDX accounts

Reports are stored under the library's OCLC symbol. They can be retrieved via EDX by using the library's OCLC symbol or via the Product Services Web site using the library's authorization and password.

### Labels for shared local catalog EDX accounts

Labels are stored with the OCLC symbol of the institution that you chose for delivery on the order form. That institution can be the individual library, materials vendor, or the institution administering the shared local catalog. Only the institution that is designated for delivery may retrieve the labels via EDX or the Product Services Web site.

### 3.3 Using Connexion with WCP Records

---

You can use OCLC Connexion browser or OCLC Connexion client to display and edit your WCP records before loading them into your local system. To use Connexion you must retrieve the WCP records via EDX or the Product Services Web, then import the records into Connexion.

#### Record location

- Connexion browser puts your imported records in the online Save File. You can search for imported records by searching for a Status value of *Imported*, or by the My Status notes that you indicated on the import page.
- Connexion client lets you choose whether the imported records go in the online save file or the offline save file.

#### Actions you can take

You can take most actions on your imported WCP records, including:

- Display Holdings
- Derive New Record
- Apply Constant Data
- Insert My Status notes
- Validate
- Update Holdings
- Export

**Warning: Lock Master Record.** Locking a Master Record loses edits. If you are working on an imported OCLC bibliographic record when you attempt to lock the corresponding master record, Connexion locks and displays the current version of the master record, overwriting any:

- Changes you made to the imported record prior to locking it
- Local data or other editing that WCP automatically included in your record

When you attempt to Lock a Master Record the system warns you that your changes will be lost and asks whether you want to continue.

If you respond...	This happens...
Yes	The master record is locked and your changes are lost.
No	The lock action is cancelled and the imported record remains as is.

#### Actions you cannot take

You cannot Delete Holdings on imported records. Imported OCLC records do not contain the indication that the item is Held or Not Held by your library. To view holdings for the item, use Display Holdings.

**More information**

For more information on importing records with OCLC Connexion, see Connexion system Help or documentation.

- Connexion browser documentation: <http://www.oclc.org/support/documentation/connexion/browser/default.htm>
- Connexion client documentation: <http://www.oclc.org/support/documentation/connexion/client/default.htm>