

Overview of the New RSA Cataloging Process for Items Without Matching Records

Revised March 24, 2023

The new process outlined in this document changes how items without matching records in WorkFlows or OCLC Connexion (if your library uses Connexion) are cataloged. This process is ongoing and involves two parts:

1. Effective July 1, 2022, your library creates brief records to catalog items without matching records already in WorkFlows or OCLC Connexion (if your library uses Connexion). The RSA cataloging request forms are no longer accessible on the RSA web site.
2. Starting March 27, 2023, RSA will work through a system-wide report of brief records with email addresses. RSA will continually place copy-level holds on the brief items to upgrade them to OCLC records with full bibliographic description. RSA will email you about the brief record upgrade through an RSA Help Desk case opened on your behalf.

This new cataloging process has three goals:

1. Faster = Speed up cataloging items without matching records, getting the item into the patron's hands quicker than waiting for RSA to provide a record.
2. Easier = Less work upfront for RSA members than submitting a cataloging request. No need to re-catalog your item when the OCLC record is ready and no CHANGE ME placeholder call number to edit.
3. Avoid duplication = Reduce the number of times the same item is submitted as a cataloging request by different libraries.

Below is a step-by-step overview of how this new cataloging process works from start to finish. Please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083 with any questions.

Step 1: Search WorkFlows for the item you need to catalog. See if there is a matching record. Whether the record in WorkFlows is brief or OCLC, attach your item if it matches. No need to create a new brief record in this case.

Step 2: If there is no matching record in WorkFlows, or if there is only a brief record, search OCLC Connexion (if your library uses Connexion). See if there is a matching OCLC record. Regardless of the OCLC record's encoding level, attach your library's 949 tag if it matches your item. Then import the record into WorkFlows. A brief record that contains the same match point as the OCLC record (ISBN, UPC, or ISSN) will be replaced with the OCLC record upon import, if the brief record was correctly created.

Step 3: If there is no matching record in WorkFlows or OCLC Connexion (if your library uses Connexion), create a brief record using the Add Title wizard in the WorkFlows

cataloging module. RSA modified all cataloger accounts to include brief record access. The brief record will allow your item to start circulating right away instead of waiting for an OCLC record to be available. For instructions how to create a brief record, please refer to this [guide](#). Videos how to create brief records are also available on the [RSA Youtube](#).

The Core Competencies for Cataloging Staff at RSA Member Libraries have been revised to reflect that the RSA basic cataloging level now includes the ability to create brief records for items without matching records using the WorkFlows Add Title wizard. Please refer to page 3 of the [Competencies](#).

Step 4: RSA continually works through a system-wide report of brief records with email addresses in their 592 fields, upgrading them to OCLC records with full bibliographic description. RSA works through this report oldest to newest based on the date that the brief record was created.

RSA will begin by upgrading brief records created in July 2022 when libraries were first asked to start creating brief records with email addresses if they were unable to find matching records in WorkFlows or OCLC Connexion (if the library uses Connexion). RSA will not, however, upgrade brief records that describe the following:

- Large print rotating collections
- Non-RSA interlibrary loan items
- On-order items
- Magazines that already have matching OCLC records in WorkFlows

RSA will only contact you when we are ready to upgrade your brief item to an OCLC record. We will use the email address you entered in the 592 field on the brief record to open an RSA Help Desk case on your behalf. If the 592 field is blank or contains the auto-generated text ****REQUIRED FIELD****, RSA will email the RSA Gmail address of the library that created the brief record.

Soon after the email is sent, RSA will place a copy-level hold on the brief item. Your library will see a hold for it on your picklist in your RSA Gmail account or in the WorkFlows Onshelf Items wizard. You will scan the item into the WorkFlows Trap Holds or Discharge wizard, attach a delivery label directed to 200-EP, and place the item in your outgoing delivery bin. If you need additional delivery bins, please email the RAILS Delivery Help Desk at railsdelivery@railslibraries.info.

RSA is only accepting physical items to upgrade brief records to OCLC records. The physical item method of submission has four clear benefits:

- 1) Eliminates the extra step of you submitting a cataloging request form when RSA is ready to catalog your brief item on an OCLC record. RSA wants to respect your time.
- 2) Easier than scanning or taking digital photos of the item, then uploading them into a cataloging request form. You also do not risk sending incomplete or unreadable scans/photos if you send the physical item.
- 3) More efficient, avoiding the struggle with incomplete or unreadable images and the resulting back-and-forth emails with RSA trying to get corrected images. This back-

and-forth only lengthens the amount of time it takes RSA to catalog the brief item on an OCLC record.

- 4) The responsibility for sending the item to RSA may not fall solely on you. Other staff at your library may check the picklist and send the item to fill the hold, allowing you to focus on cataloging and other tasks in your workload.

If your library does not want to send your brief item to RSA, please reply to the Help Desk case to let us know. RSA will cancel the hold and potentially work with another library to get the item.

Step 5: Once the brief item arrives at RAILS East Peoria, and it is picked up by the RSA cataloger, they will upgrade its brief record to an OCLC record within 14 business days. That turnaround time begins once the RSA cataloger has the item in hand. The day the item arrives in delivery and the day the RSA cataloger has it in hand may not be the same.

To prevent the item from filling holds while it is being cataloged, RSA staff will check it out to a D1500 account, used internally.

After RSA catalogs the item, they will email you from the Help Desk case to confirm the brief record has been upgraded to an OCLC record and discharge the item from WorkFlows.

Depending on what WorkFlows says to do upon discharge, RSA will either return the item to your library or send it to another library to fill a hold. RSA will let you know the date they plan to drop the item into delivery. The date you receive the email that the brief item has been upgraded to an OCLC record and the date the item is dropped into delivery may not be the same.

Step 6: After the item returns to your library, discharge it from WorkFlows and either shelve it or use it to fill a hold, depending on what WorkFlows tells you to do.

Once the item is cataloged on the OCLC record:

- No need to re-catalog your item. All checkout statistics, inventory activity, and active holds automatically move with the item from the brief record to the OCLC record.
- No need to edit a CHANGE ME placeholder to reflect your actual call number and item information (i.e., item ID, home location, item type, item categories 1-5, and price). The call number/item information you cataloged on the brief record is now attached to the OCLC record.
- If your library belongs to OCLC, your OCLC holding symbol will be updated on the record in OCLC WorldCat the following month, when RSA runs a batch process. Updating the holding in OCLC WorldCat makes the item visible for WorldShare interlibrary loan requests (if your library uses WorldShare).

For a more detailed explanation of steps 4 through 6 above, please refer to the [Procedure When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record](#), as well as the accompanying [video](#) (approximately 12 minutes).