

## 8. Cataloging Department Update

### Status of the Cataloging Request Backlog

On October 6, 2023, RSA announced on the listserv that the Cataloging Maintenance Center (CMC) began working on the cataloging request backlog for braille, encoding level 8, and encoding level M records, upgrading them to full bibliographic description in OCLC. These cataloging requests were submitted as far back as 2017 and as recently as 2020.

The records that the CMC upgrades to full bibliographic description will ultimately improve the user experience. Those records will make the item easier for staff and patrons to find, whether they are searching WorkFlows or the RSAcat. The full bibliographic description will also help users understand what the item is about, helping them decide if they want to check it out or place a hold on it.

As of the date this update was written on November 1, 2023, the CMC has processed:

- encoding level 8 requests = 195
- encoding level M requests = 12
- braille requests = 4

Approximately 4,467 cataloging requests remain to be processed in the backlog.

If your library has cataloging requests in this backlog, you will receive emails from the CMC staff as they process the requests or if they need you to send the physical item in delivery if the digital images or paper photocopies originally submitted with the cataloging request are lost, unreadable, or incomplete. Thank you in advance for your cooperation!

### Brief Record Upgrade Progress

Between the last Users Group on August 9, 2023 and the date this update was written on November 1, the RSA cataloging department has upgraded 760 brief records to OCLC records with full bibliographic description, improving searchability in WorkFlows and the RSAcat. RSA is currently upgrading brief records entered into WorkFlows in October and November 2022.

Thank you to those libraries that have filled RSA's copy-level holds and sent the items in delivery to the RAILS East Peoria office.

If you do not want to send an item in delivery, please remember to reply to the email that RSA sends you when we are ready to upgrade the brief item to an OCLC record. Your reply is important because it lets RSA know to cancel the hold and delete your email address from the brief record to avoid contacting you again about that item.

## Catalog TV Series to Ensure a Positive Patron Experience

Please prefer a single comprehensive record that describes a complete season of a TV series, with the multi-disc set assigned a single item ID, rather than each disc assigned its own item ID.

The practice of assigning each disc its own item ID risks placement of holds on the incorrect disc and frustration for both library staff and patrons when the incorrect disc fills the hold.

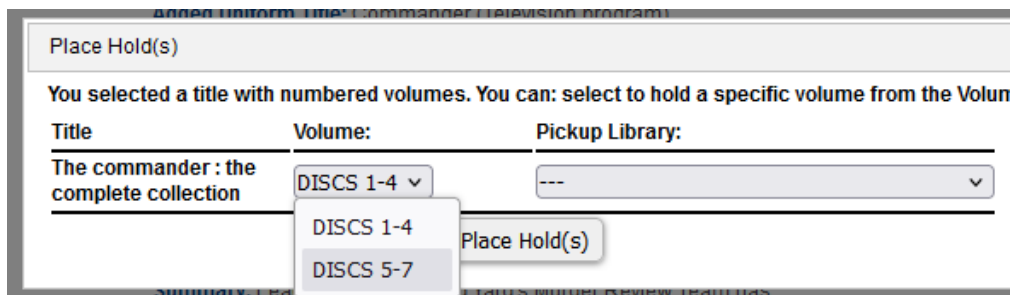
If assigning each disc of a TV series its own item ID is a library's preferred method, that library should catalog each disc on separate OCLC records that describe each specific disc, rather than on a single comprehensive record that describes all discs in the set.

If each disc of a TV series is assigned its own item ID and cataloged on the comprehensive record, the library must use the pipe Z analytic, entered as |Z , in the call number before the specific disc number. To create the | , simultaneously press <Shift> and < \ > on the keyboard. The |Z is critical because it allows the patron to select the desired disc when they place the hold in the RSAcat.

Example of a call number with |Z:

**Call number:** DVD TV COM|ZDISCS 1-4

The |Z in that call number generates a volume drop-down menu on the RSAcat place holds screen:



The [Cataloging Best Practices for RSA Member Libraries](#) are currently under revision, but information about cataloging TV series can be found on page 11.

## Annual Magazine Records Launching By the End of November

Starting in 2024, RSA will create new records in WorkFlows each year for the following magazine titles:

*Better Homes and Gardens*  
*Consumer Reports*  
*Good Housekeeping*  
*National Geographic*  
*The New Yorker*  
*People*  
*Time*

Each of the above titles has at least 800 library issues attached to its comprehensive record, which describes all publication years of that magazine.

RSA will create annual magazine records each November for the upcoming year and announce them on the RSA listserv. Subscribe to the listserv [here](#).

The 2024 records for the above titles have been created in WorkFlows, but please wait to begin using them until there is an announcement on the RSA listserv.

Using annual records eases the cataloging of the magazine in the WorkFlows Call Number & Item Maintenance wizard, as well as improves search and display in both WorkFlows and the RSACat.

Annual records describe issues of that magazine only published during a single year. Libraries will attach their issues for that year to the annual record.

For example, if cataloging a 2024 issue of *People*, search *People* in the Call Number & Item Maintenance wizard using the periodical title field.

In the result list, look for *People* with [2024] in its title and 2024 listed as the pub. year.

The screenshot shows the 'Call Number and Item Maintenance' wizard interface. The search criteria are: Author: (empty), Title: (empty), Series: (empty), Subject: (empty), General: (empty), and Periodical Title: people. The current record is 'People [2024] --- TEST --- ID:2323565-1001 --- Ctrl#:a2323565 --- Copy:1'. The search results are displayed in a table with the following data:

Title	Author	Carrier Type	Pub. Year	Library Copies
People [2024]			2024	1
People		volume	1974	2023
People			2002	1772
Unavailable for display				
PETA global		volume	2017	7
Top 100 careers without...			2007	0
People style watch			2002	1

Select *People* [2024] from the result list. Click Modify at the bottom of the screen to open the record.

Then click Add Call Number at the bottom of the screen to attach the new issue to the annual record.

Libraries that use the WorkFlows Serial Control module will continue using the comprehensive records to catalog their magazine issues. Using the comprehensive records avoids the need to create new serial control records on the annual records. A Serial Control library may choose to enter their magazines on the annual records if they create new serial controls.

This information about annual magazine records will be included in the [RSA Guidelines for Cataloging Magazines in WorkFlows](#), currently under revision.

### **Beware of Non-Holdable Home Locations**

RSA recently received a couple questions involving non-holdable home location codes in WorkFlows. To see which home locations are non-holdable, refer to the non-holdable column on the complete list of home locations available [here](#).

Please do not rely solely on a non-holdable home location to block holds. Items assigned non-holdable home locations do allow holds when they are checked out because WorkFlows considers the checked out current location as available to fill a hold.

RSA recommends using an item type with a no holds rule set up for it, in addition to the non-holdable home location, to ensure holds are fully blocked.

If you would like RSA to run a report of home location codes in your collection to see if you are currently using any non-holdable home locations, submit an RSA report request [here](#).

If you need to set up non-holdable item types for any items assigned non-holdable home locations in your collection, please email [help@rsanfp.org](mailto:help@rsanfp.org). RSA will help you set up an item type with a no holds rule and then batch edit the affected items to use the newly set up item type.

### **Soft Launch of RSA Cataloging Site Visits**

The RSA cataloging department is excited to visit a few libraries before the end of this year to soft launch cataloging site visits!

These visits will be the perfect opportunity to connect with libraries, either in-person or virtually (depending on the library's preference), share a few helpful cataloging topics, and answer any questions the library may have for RSA about brief records, cataloging parameters, items on wrong records, etc.

RSA plans to officially launch cataloging site visits in 2024. Please watch the listserv for an announcement, as well as a link to an online form to request a cataloging site visit. RSA will also be reaching out to libraries that we have not recently connected with to schedule cataloging site visits. We hope you will consider a visit, whether in-person or online!

### **Mentorship Program for Cataloging Professionals Survey**

Please encourage cataloging staff at your library to complete the survey linked below if they are interested in possibly participating in a mentoring program. Survey responses are due soon on Friday, November 10, 2023.

Shared on behalf of Nincy George, RAILS Cataloging Services Manager:

Are you interested in professional growth and learning in cataloging? Are you enthusiastic about sharing your knowledge and experiences or seeking guidance from experienced cataloging professionals? If so, we invite you to participate in our Mentorship Program Interest Survey: <https://shorturl.at/ewxTY>

RAILS and Illinois Heartland Library System (IHLS) are exploring the creation of a cataloging-focused mentorship program for all levels of cataloging staff in Illinois. This survey is meant to gauge interest in program development and the structure of a mentorship program. Staff from all library types and affiliations are welcome to participate in the survey. It's open from October 16 through November 10.

For questions about this survey, please contact Jennifer Baugh ([jbaugh@illinoisheartland.org](mailto:jbaugh@illinoisheartland.org)), Nincy George ([nincy.george@railslibraries.org](mailto:nincy.george@railslibraries.org)), or Dr. Pamela Thomas ([pthomas@illinoisheartland.org](mailto:pthomas@illinoisheartland.org)).

## Upcoming RSA Cataloging Events

Final cataloging workshops of 2023 are scheduled:

### Bibload Workshop

Wednesday, December 6, 2023

1:00 – 3:30 pm in Zoom

Registration is available [here](#) and closes November 29 at 5:00 pm.

### Basic WorkFlows Cataloging Workshop

Tuesday, December 12 – Thursday, December 14, 2023

9:30 – 12:00 pm each day in Zoom

Registration is available [here](#) and closes November 28 at 12:00 pm.

Additional cataloging workshops will be scheduled in 2024 and posted on the [L2 calendar](#). Please watch the RSA listserv for invitations closer to the workshops.

RSA Cataloging Virtual Office Hours is also coming up!

Wednesday, December 20, 2023

11:00 am – 12:00 pm in Zoom

No registration necessary! Drop in and ask your cataloging questions – no need to stay the entire hour. Watch the RSA listserv for Zoom details closer to the event.

## Reminder – OCLC Connexion Browser Sunset

Access to OCLC Connexion Browser (<http://connexion.oclc.org/corc.html>) will end on April 30, 2024. A final reminder will be shared on the RSA listserv closer to the sunset date.

Connexion Client and Record Manager will continue as the OCLC cataloging interfaces. Training how to use Connexion Client and Record Manager is available on the [OCLC Metadata Services training page](#).

RSA recently received questions about the impact of the Connexion Browser sunset on OCLC local holdings maintenance. Some RSA libraries perform local holding maintenance to keep their magazine holdings updated in OCLC Worldcat so they are accurate for WorldShare interlibrary loans.

If your library uses Connexion Browser to create, edit, and delete magazine local holding records, you will need to transition to Record Manager if you want to continue making those updates. Training how to use Record Manager is available [here](#).

There is no requirement from RSA to update magazine holdings in OCLC or use OCLC Connexion Browser, Client, or Record Manager to catalog. It is a local library decision. Please keep RSA informed if you decide to drop your library's OCLC membership.