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When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record Procedure

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Questions? Please reach out to help@librariesofrsa.org or 866-940-4083.

A short video that explains this procedure is available here:

<https://www.youtube.com/watch?v=rPk66VJxsM>.

In spring 2023, RSA began working through a system-wide report of brief records with email addresses in their 592 fields, upgrading them to OCLC records with full bibliographic description. Full bibliographic description includes (but is not limited to):

- ISBN
- ISSN
- UPC
- Author
- Title
- Edition statement
- Publication information (publisher location, name, and year)
- Physical description (pagination, runtime, illustrations, etc.)
- Summary and contents notes
- Subject and genre headings

The full bibliographic description on the OCLC record will make the item easier for staff and patrons to find, whether they are searching WorkFlows or 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.

RSA will upgrade brief records to OCLC records whether the library that created the brief record is an OCLC member and whether that library uses OCLC Connexion Client or OCLC Record Manager.

RSA will work through the brief record 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 when they were unable to find matching records in WorkFlows or OCLC (if the library uses Connexion Client or Record Manager).

RSA will not, however, upgrade brief records that describe the following:

- Large print rotating collections

- Non-RSA interlibrary loan items
- Non-transitable items
- On-order items
- Magazines that already have matching OCLC records in WorkFlows
- Items whose containers, title pages, publication information, ISBNs, or UPCs are thoroughly covered by labels, book pockets, or other types of processing, obscuring the information necessary to catalog the item on an OCLC record.

RSA understands each library has its own procedures for processing items. If possible, please avoid covering the title page, publication information, ISBN, and UPC with pockets and labels. Covering this information makes the item difficult to catalog on an OCLC record.

If this important information is covered on your item, and RSA is unable to find it from other sources (Amazon, IMDb, etc.), RSA will leave the item cataloged on the brief record and let you know they were unable to upgrade it to an OCLC record.

Even though RSA brief record cleanup is ongoing, libraries are asked to continue creating brief records for items without matching records already in WorkFlows or OCLC (if the library uses Connexion Client or Record Manager). The procedure how to create a brief record is available here: <https://support.librariesofrsa.org/project/create-a-brief-record/>.

Remember: If you find a record, either OCLC or brief, already in WorkFlows that matches your item, attach your item to it. No need to create a new brief record in this case. Only create a brief record if there is no matching record for your item in WorkFlows or OCLC (if your library uses Connexion Client or Record Manager).

1. When RSA is ready to upgrade your brief item to an OCLC record with full bibliographic description, you will receive an email from the RSA Help Desk (help@librariesofrsa.org) at the email address you entered into the 592 field on the brief record.

If the 592 field is blank or contains the auto-generated text ****REQUIRED FIELD****, RSA will email the Director of the library that created the brief record if they are unable to determine the email address for that library's cataloger.

The email from the RSA Help Desk will use the subject line "Please Read: Brief Record Upgrade," followed by the specific brief record title.

The RSA cataloger will email you from the RSA Help Desk so a case can be created to track the upgrade of the brief record.

In the email, the RSA cataloger will let you know they have placed a copy-level hold on your brief item so its record can be upgraded to an OCLC record.

When the hold is placed, RSA will use the holds comments to enter “Please send to RSA for cataloging. Thanks!” This comment will help staff scanning the items into WorkFlows understand why the item is being sent to RSA.

If other staff at your library pull items to fill holds, you may want to give them a heads-up that this item will be sent to RSA for cataloging, so they understand the hold is not a mistake.

If possible, when you send the item in delivery, please write c/o or attn. followed by the RSA cataloger’s first name, on the notes line of the RAILS delivery label. This step will ensure the item is routed to the appropriate cataloger once it arrives at RAILS East Peoria.

RSA is only accepting physical items to upgrade brief records to OCLC records. Based on the RSA experience processing cataloging requests, particularly the backlog over the past several months, the physical item method of submission has four clear benefits:

- a. 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.
- b. It is 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.
- c. 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.
- d. 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 needs additional delivery bins to send items to RSA for cataloging, please email the RAILS Delivery Help Desk at railsdelivery@railslibraries.org.

2. Your library will see a hold for the brief item on your library’s picklist in your RSA IONOS email account or in the WorkFlows Onshelf Items wizard. The hold pickup library will be listed as AG_ALS-PDC, and the user ID will start with D1500.

If your library does not want to send your 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.

3. Your library will scan the item into the WorkFlows Trap Holds or Discharge wizard.
4. Attach a delivery label to the item and fill it out as follows:
 - a. Route: leave blank
 - b. To: 200-EP
 - c. For: leave blank
 - d. From: your full library name
 - e. Notes/Date Due: Write c/o or attn. followed by the first name of the RSA cataloger who emailed to let you know they were placing a hold on your item.
 - f. Circle One: Hold
5. Place the item in your outgoing delivery bin. RAILS will pick up your item on your next regularly scheduled delivery day.
6. Once the item arrives at RAILS East Peoria, 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.
7. To prevent the item from filling holds while it is being cataloged, RSA will check it out to a D1500 account, used internally.
8. After RSA upgrades the brief record to an OCLC record, they will do the following:
 - a. RSA will reply to you from the Help Desk case to confirm the brief record has been upgraded to an OCLC record.
 - b. RSA will discharge the item from WorkFlows. Depending on what WorkFlows says to do, the RSA cataloger will either return the item to your library or send it to another library to fill a hold.
 - c. If, upon discharge, WorkFlows says to route the item to your library, the RSA cataloger 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.
 - d. If, upon discharge, WorkFlows says to route the item to another library to fill a hold, the RSA cataloger will let you know they are sending it to fill a hold, along with the date they plan to drop the item into delivery.
9. Once the item arrives in delivery at your library:
 - a. Discharge it and watch the WorkFlows screen to determine if it should be shelved, fill a hold, etc.
 - b. 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.

- c. 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.
- d. 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 to update OCLC holdings. Updating the holding in OCLC WorldCat makes the item visible for WorldShare interlibrary loan requests (if your library uses WorldShare).

If your library, however, assigned the item category 6 code OCLCEXCLUD to the item when you cataloged it in WorkFlows, its holding will not be updated in OCLC WorldCat.