



WorkFlows Search Tips Cheat Sheet

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Quickly Narrow Down Possible Record Matches

When looking for a matching record in WorkFlows, catalogers oftentimes encounter overwhelming search results and wonder where to begin. The following are techniques you can use to quickly eliminate non-matches and more readily find potential records that fit your item.

Remember, after finding a possible record match, ALWAYS go through all match points before deciding to use a record. For detailed information about match points, please see:

- [Matching an OCLC Record to Your Book](#)
- [Matching an OCLC Record to Your Video or Sound Recording](#)
- [Matching a Record to Your Magazine](#)

Try these techniques to narrow down possible record matches:

1. **Begin with an ISBN or UPC search.**

Start looking for records with either an ISBN search for books, audiobooks, Playaways, etc., or a UPC search for DVDs and Blu-rays. ISBNs and UPCs are *typically* unique and used for specific publications and *generally* will not be used again for a new, different publication. Searching by ISBN or UPC first can swiftly bring you to possible record matches due to this specificity.

However, always keep in mind that while an ISBN or UPC search is a terrific place to start, you must **always check all match points** because records are not perfect—an ISBN or UPC might be included on a record when it shouldn't be listed. Or the ISBN or UPC might not be listed on a matching record at all and needs to be added.

If you're not seeing a good, matching record after searching by ISBN or UPC, try a title/author search next. RSA recommends performing both types of searches in WorkFlows prior to creating a brief record to be certain nothing is accidentally missed.

2. **Check the “Pub. Year” column in the search results.**

If you get multiple results after performing a search, quickly eliminate non-matches by figuring out your item's publication date and look at the “Pub. Year” column in the search results.

If you click the “Pub. Year” box (circled below), the results will reorganize in numerical order for easier viewing—provided there are not too many results. Click the “Pub. Year” box once to sort in ascending order, click a second time to restructure in descending.

Anything without a date (i.e., brief records) will be listed near the records with the oldest publication dates.

Carrier Type	Pub. Year	Library Copies
	2021	0
volume	2018	4
volume	2016	6
audiodisc	2016	2
volume	2016	6
volume	2016	1
volume	2015	2
	2014	1
	2013	7
audio disc	2013	9
volume	2013	2

If you do not see an OCLC record with a publication date that matches your item, and there isn’t a matching brief record to use, there is no need to look any further.

3. Home in on a specific, easily identifiable match point.

If utilizing the “Pub. Year” column isn’t overly helpful for nixing non-matching records, or if you need to narrow results down further, choose another highly specific match point to assess a record. What you select may vary by item format and personal preference, so several examples are listed below:

a. Check the number of discs and runtime.

DVD/Blu-ray items might have several possible records to sleuth through in the search results, all with the same publication date. To quickly remove non-matches, check the 300 field for the number of discs and runtime. Be sure to look at \$a and \$e (when present) to get the correct number of discs for that record. If the number of discs or runtime does not match your item, that record is not a fit.

b. Check fields 347 and 538 for format.

Another speedy check for DVDs and Blu-rays is to look at fields 347 \$b and 538. Those fields list if the record is for a DVD, a Blu-ray, or both (such as with combo pack records). If the format does not match your item, the record is a non-match.

c. Look at the 300 field for pagination and dimensions.

With books, rapidly evaluate a possible record by checking the listed pagination and dimensions. If the record's listed pagination differs by more than 3 pages, or if the record's given dimensions differ by more than 3 cm, then the record does not work for your item.

d. Publisher name in field 264 \$b.

Another match point you can use to eliminate a record is publisher—this is particularly useful when cataloging books since the publisher is easily identifiable. Remember, the preferred source of the publisher is found on the title page of a book, not the verso. If the publisher listed within the record's 264 \$b does not match what you see on the title page, that record is not a match.

Finally, sometimes *combining* the above tactics is beneficial when appraising records swiftly. If a record makes it through a couple of elimination rounds, it is likely a good match for your item.

If you cannot find a matching record after utilizing these techniques, one most likely does not exist in WorkFlows. At this point, if your library uses OCLC Connexion Client or Record Manager, check OCLC for a matching record.

If a matching record does not exist in OCLC, or if your library does not use OCLC Connexion Client or Record Manager, please [create a brief record](#) in WorkFlows to let RSA know you need cataloging assistance and to get your item circulating.

Furthermore, keep in mind that you should be creating brief records anytime you are uncertain about a record matching your item, or if all you can find are records that only “somewhat” match.

Questions?

If you have questions about any of these tips or anything else cataloging related, please reach out to the RSA Help Desk for assistance at either 866-940-4083 or help@librariesofrsa.org.