# Copy Cataloging with CatExpress®

## Logon to CatExpress – http://connexion.oclc.org

To set up automatic logon:
- Click **Local Browser Settings**
- Enter authorization and password
- Optional: Enter a name
- For Dewey-only, enter **N**
- Optional: designate as default
- Click **Save Settings**



## Copy cataloging workflow

1. Search WorldCat to find a matching record.
2. Optional: Edit record.
3. **Save to Catalog** (sets your library's holdings in WorldCat, and exports record to a file for loading into your ILS).

# Basic search

| Standard Number | ISBN, ISSN, LCCN |
|---|---|
| Keywords | Words in any order from title, author, subject, notes, publisher fields |
| Title phrase | Title words in order from left to right (omit initial articles – **a, an**, **the** and equivalents in other languages) |
| Language of Cataloging Limiter | Restricts results to records with bibliographic description in selected language – resource may be in any language |

# Advanced search

- From the **Search Options** menu, select **Advanced**
- Search up to 3 different indexes
- Apply Language of Cataloging Limiter
- Limit search by:
    - Publication date
    - Record format
    - Language of resource
    - Internet (All, Internet, or Non-Internet)
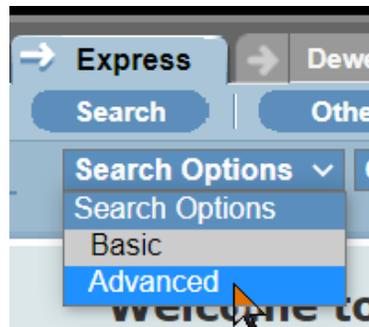
# Match records to items

Focus on these fields:
- Title proper (245)
- Edition (250)
- Publisher (260 or 264)
- Physical description (300)

Also note:
- Language of cataloging (040 $b)
- Cataloging Source (040 $a and $c)

For detailed information, consult *Bibliographic Formats and Standards* chapter 4, When to Input a New Record, at http://www.oclc.org/bibformats/en/input.html. If a difference justifies a new record, the item is not a match.

If fields noted above match, usually prefer a record from a national library.

| Symbol | Library |
|---|---|
| DLC | Library of Congress |
| PCC | Program for Cooperative Cataloging |
| GPO | Government Printing Office |
| NLM | National Library of Medicine |
| NAL | National Agricultural Library |
| NLC | Library & Archives Canada |
| UKM | British Library |

# Edit records (optional)

Edit record to add information such as call number, barcode, or notes before you Save to Catalog. Alternatively, you can add this information after you export the record and load it into your local integrated library system (ILS).

- Click **Edit Record**
- OCLC Holding Library code (4-character code profiled by OCLC) is required
- All other fields are optional
- Optional: click **MARC Display ON** to display MARC tags for each field
- Optional: click **Help Display ON** to display pop-up help for each field (depending on web browser settings), and a link to *Bibliographic Formats and Standards* for that field
- Optional: Enter call number class and cutter in 09X or 852 fields, or both

    1. Select call number type: Dewey (092), LC (090), NLM (096), or Local (099).
    2. Enter Call Number Class
    3. Enter Cutter

    If you create labels using the OCLC Cataloging Label Program, data entered in 1-3 will be copied to the Label Program.

    4. Enter Class in 852 $h
    5. Enter Cutter in 852 $i



- Optional: click **Preview** to display edits

# Create labels with OCLC Cataloging Label Program (optional)

- OCLC Cataloging Label Program required (free download from https://help.oclc.org/Librarian_Toolbox/Software_downloads/Cataloging_software_downloads)
- After entering call number (see 1-3 above), click **View Label**
- CatExpress sends data to OCLC Cataloging Label Program
- Edit and print labels immediately, or save labels for printing later

## Save to Catalog

Click **Save to Catalog** to:
- Set your holdings (attach your library's OCLC symbol to WorldCat record)
- Add record to your export file

## Download export file

- Download files of records at end of cataloging session (or anytime within 90 days)
- Two ways to access same files:
    - **Express** > **Other Options** > **Download Export Files**
    - **General** > **Admin Options** > **Download Export Files**
- Select file(s) and click **Download**

## Preferences

Setting preferences need only be done once for each authorization.
Click **General** > **Admin Options** > **Preferences.**

- Express options: set defaults for record view (Label or MARC), default call number type, default label format, default holding library code, default location.
- Export options:
    - Enter default export file name
    - Select export file type:
        - Institution: all records exported by users at a single institution.
        - Individual: collects a separate file of exported records for each authorization number (useful if different staff members each manage their own export files).
    - Fields to delete on export (optional): Enter 3-digit MARC tag numbers to specify the fields you want to remove from each bibliographic record before exporting the record.

## Delete holdings

When you remove items from your collection and remove the record from your local catalog, it is important to also delete your holdings from the WorldCat record.

- Find the record to which your holdings are attached. If available, search by OCLC number.
- A Delete Holdings button display on records that have your holdings attached.
- Click **Delete Holdings**; then click **Yes** to confirm the action.

# CatExpress transaction reports

- Available through WorldShare Metadata at your library's custom URL
- If you have a WorldShare account, log in with your user name and password
- If your library isn't set up for WorldShare, request access by completing form at http://oc.lc/getcm.  If you have any questions, contact OCLC Support in your region: http://oc.lc/support
- Choose **Metadata** > **My Files** > **Downloads**
- Filter by **Reports**
- Click **Download** to download/save the report (a .csv file)
- Open in Excel for ease of reading and use

# CatExpress documentation

https://help.oclc.org/Metadata_Services/CatExpress

# Test your knowledge

1.  What is OCLC?

2.  What is WorldCat?

3.  CatExpress is intended for which of the following uses?:
    a.  Original cataloging
    b.  Copy cataloging with extensive editing
    c.  Basic copy cataloging
    d.  Editing WorldCat records

4.  What button in CatExpress adds your holdings to WorldCat?

5.  What button in CatExpress exports the record to a file you load into your local catalog?

# Check your skills

Log on to CatExpress with your own authorization and password.

6.  From the Basic search screen, enter standard number search using this ISBN: 978-0-8050-8043-8.  What is the title of the book?

7.  Search and select matching records, using this example audio compact disc:
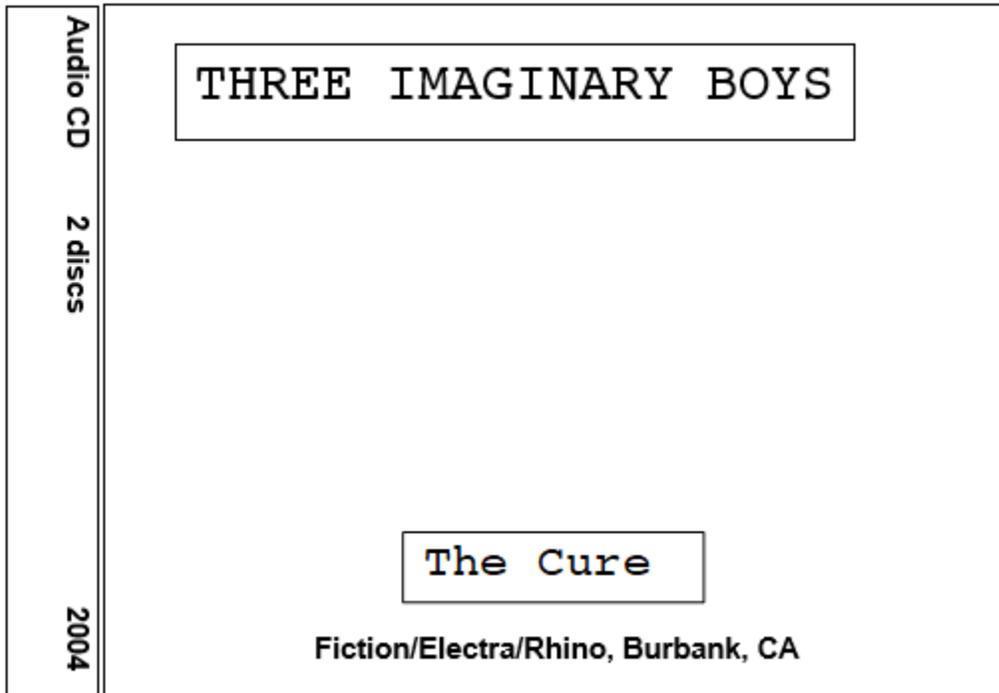


a.  Perform a basic keyword search.  How many records do you find?

b.  Perform a basic title phrase search.  How many records do you find?

c.  Why is there a difference in the number of records found with a keyword search and a title phrase search?

d.  Locate the best matching WorldCat record for the example above.  What is the OCLC number of this record?   HINT: use Language of Cataloging limiter to reduce search results.

e.  On the advanced search screen, do a search for the example audio CD above.  Use qualifiers to narrow your search.  Was this a better way to locate matching records? Why or why not?

# Answers

1. OCLC is a global library cooperative that provides shared technology services, original research and community programs for its membership and the library community at large.
2. WorldCat is the world's largest bibliographic database. It is the source of the MARC records used when cataloging with CatExpress.
3. C. Basic copy cataloging.
4. Save to Catalog.
5. Save to Catalog.
6. Type **9780805080438** in the basic search box. Click the radio button next to **Standard Number**. You should see the title *Everything is Miscellaneous* by David Weinberger.
7. Searching and matching records.
   a. Type **three imaginary boys** in the basic search box. Click the radio button next to **Keyword**. You should find approximately 527 records.
   b. Type **three imaginary boys** in the basic search box. Click the radio button next to **Title Phrase**. You should find approximately 29 records with Language of Cataloging Limiter set to English, or approximately 91 records without a language of cataloging limit.
   c. The keyword search finds the words in any order in many different fields in the record. The title phrase search finds the words in order from left to right, looking only in title-related fields.
   d. The best matching WorldCat record is OCLC number 57226229. The title (245), publisher and date of publication (260), and physical description (300) match; and a national library (Library of Congress) created the record.
   e. From the **Search Options** menu, select **Advanced Search.** Enter **three imaginary boys** in the search box. Select **Title Phrase (ti=)** from the list of indexes. Enter **2004** in the "Date (single or range)" qualifier box. Select **Sound Recordings** from the "Record Format" menu. This should return approximately 7 records.