Inventory: Cataloging workflow

Cataloging (creating and updating records) should be performed in OCLC Connexion

See field usage guidelines for more details on Holdings and Item records

Checklist

- Importing a record
- Instance data
- Holdings data
- Item data

Preconditions: a record has been created or identified and updated if needed in OCLC

Importing a record

1. In OCLC Connexion, Copy the OCLC record number (*EditCut Copy PasteCopy Control Number* or *Right-clickCopy Control Number* or *CTRL+T*)
2. In Inventory, navigate to the existing record
   a. See Importing and Overlaying documentation for how to create a new record if needed
3. In the right pane Actions menu, select "Overlay"
4. Paste the OCLC number into the box
5. Select "Import"
6. Verify that the newly created record has the correct OCLC number
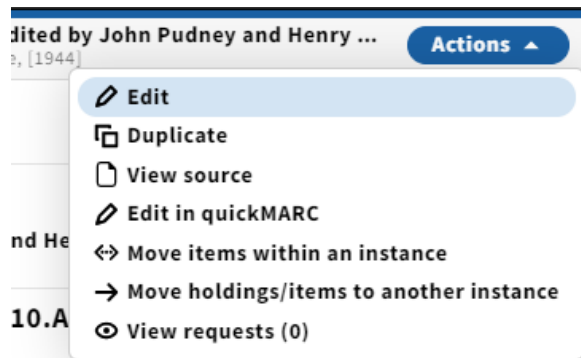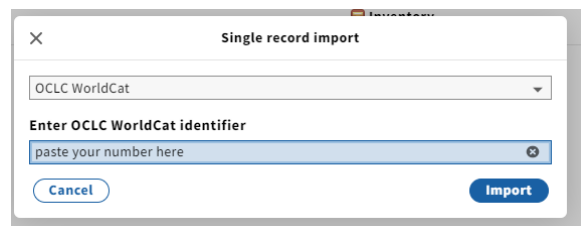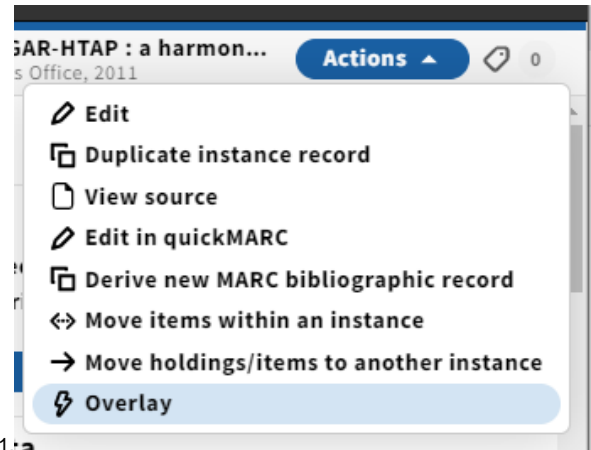
Instance data

1. In the right pane Actions menu, select "Edit" to edit the instance data
2. In the *Administrative Data* section enter **today's date** in the **Cataloged date** field;
   and select **Cataloged** in the **Instance status term** menu

3. Also in *Administrative Data*, create a new Administrative data note and enter your statistical tracking information (use macros to enter this text). (See Recording Statistics)
4. Save and close the instance record

Instance HRID

00015000099

Cataloged date

2021-05-04

Instance status term

Cataloged (folio: cat)

Holdings data

1. View holdings Actions Edit
2. In the *Administrative Data* section verify/add the holdings type
3. In the *Location* section verify/add the permanent location; enter the call number, including the call number type
4. In the *Holdings Details* section add holdings statements and/or notes if needed
5. Select save and close

⌃ **Location**

Holdings location

Permanent*	Temporary
Library Tech Services (cts)	Select location
Location look-up	Location look-up

Shelving order	Shelving title

Holdings call number

Copy number	Call number type	Call number prefix	Call number	Call number suffix
	Library of Congress classifica	852 $k	852 $h $i	852 $m ⊗

⌃ **Holdings notes**

Note type	Note	Staff only
Transaction data	date:20210426 ttype:c user:lew235 ploc:lts	☑

Item data

1. Open the existing item record, or create a new one if needed
2. In the *Administrative Data* section, enter (or verify) the **barcode**
3. In the *Item Data* section verify/select the appropriate **material type**
4. In the *Loan and Availability* section verify/select the appropriate **loan type**
5. In the *Item Notes* section add notes if needed
6. Select Save and close

⌃ **Administrative data**

⌄ Record last updated: 5/4/2021 2:33 PM

☐ Suppress from discovery

Item HRID	Barcode	Accession number	Item identifier
	31924ABCDE		

⌃ **Item data**

Material type *

Book

Copy number

Call number type Call number prefix Call number

Select type

Number of pieces Description of pieces

⌄ Enumeration data

⌄ Condition

⌃ Item notes

(Add note)

⌃ **Loan and availability**

Permanent loan type *

Circulating

Temporary loan type

Select loan type

Status

Available