Step 1. Run Item Information/Library cleanup report in BLUEcloud Analytics.

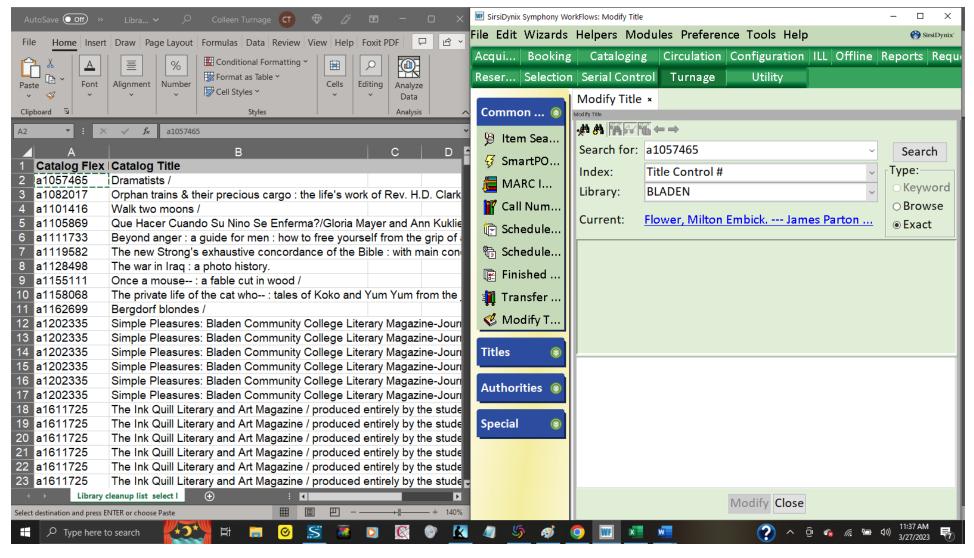
- Select your library and run the report
- Export the report in plain text
- Sort the report
 - Delete the first two lines (they're not needed)
 - Custom Sort by Format first. Delete the EQUIP records from the list (unless you're using the report to inventory your library's collection!).
 - o Custom Sort by Item Collection next. Delete all the DELETEME and DISCARD records from the list.
 - o Custom Sort by Catalog Flex Id. This puts your non-OCLC #s first in the list!
- Keep the following columns in your final report. You can hide or delete the rest of the columns.
 - Catalog Flex Id
 - o Title

Step 2. Open WorkFlows and use the following wizards to search the catalog. (Make sure you have Tabbed Windows enabled in your Preference/Deskstop Setup)

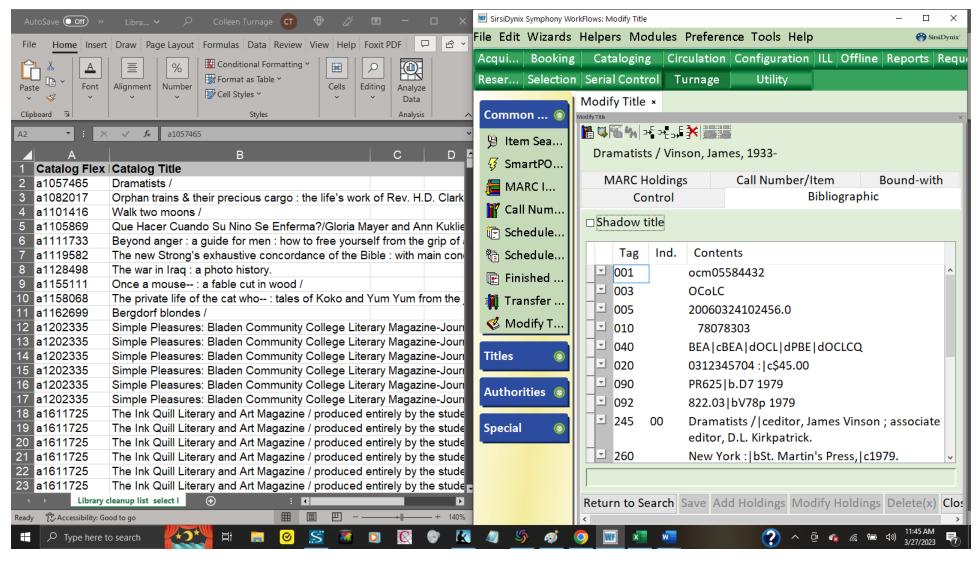
- Modify Title wizard. Property settings you should use:
 - Search index: Title control #
 - Search library: Select your library branch from the list
 - Search type: EXACT
- SmartPort wizard. Property settings you should use:
 - Temporarily set SmartPort to "Replace Current Record" when you open the wizard. It'll revert to its original settings after you close the wizard.
- Transfer wizard. (You may want to refer to Property settings you should use:
 - o Type: EXACT
 - Index: Title Control #
 - Library: ALL

Step 3. Open the web browser version of OCLC Connexion (https://connexion.oclc.org/).

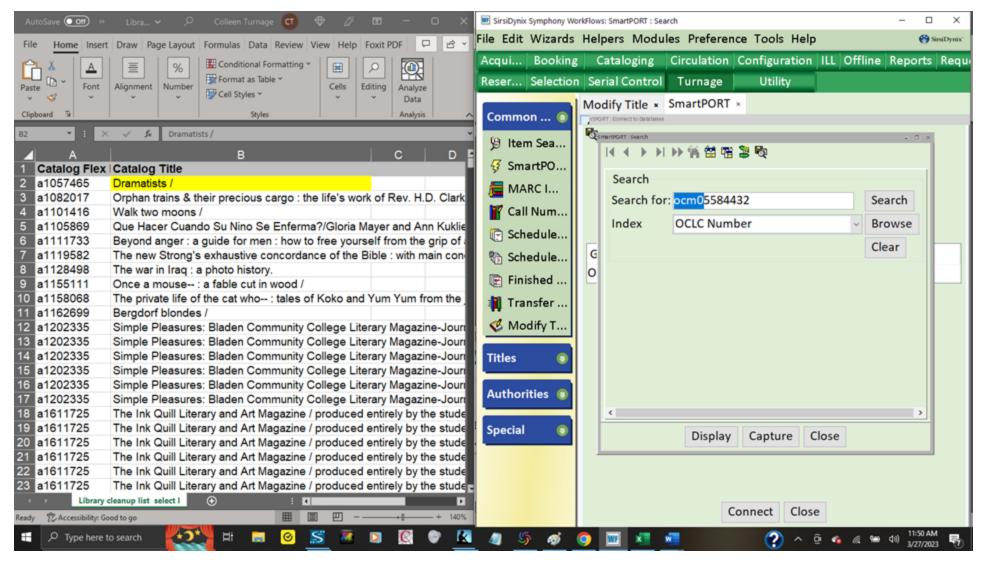
Step 4. You're ready to begin the process of replacing your non-OCLC records in your library's collection with OCLC copy.



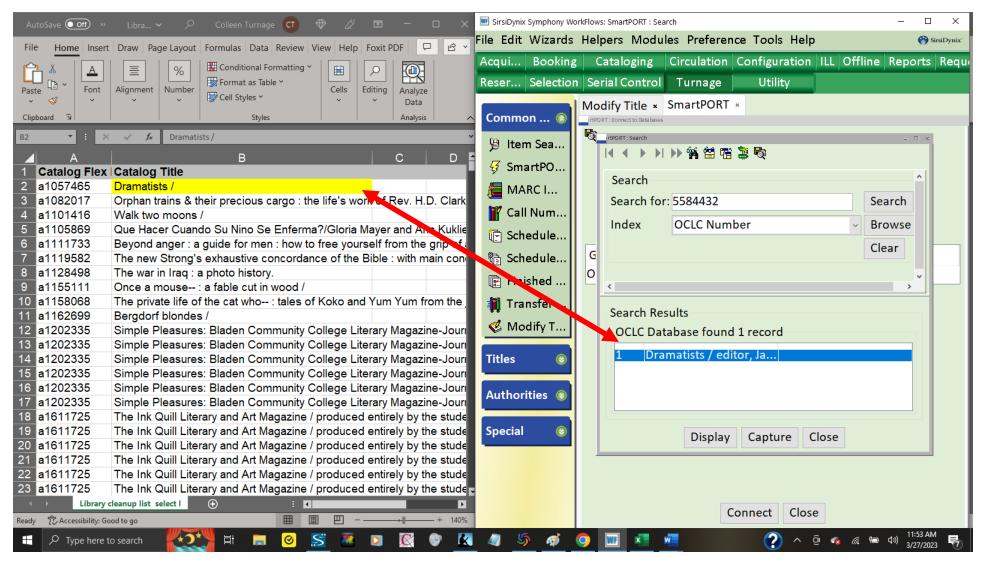
Have your BCA report open on one side of your screen and WorkFlows open on the other side of your screen. Use the Configure Options helper (it's the first helper) to Search Shadow = NO. Use the copy/paste command to enter your first Title Control #.



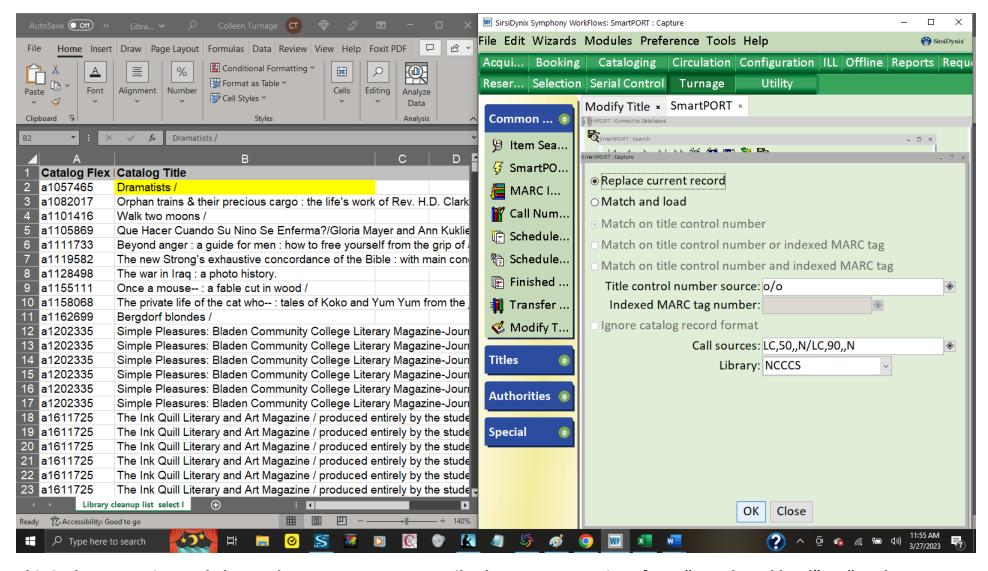
Note that a1057465 displays an OCLC# in the MARC tag 001 field! You don't even need to search OCLC for this one to know which # to use! (If you were to click on the Control tab folder, you'd see that the title control # is a1057465. This is a classic example of what happens when the SmartPort settings are incorrectly set.). Highlight the # in the 001 field and use CTRL-C) to copy it.



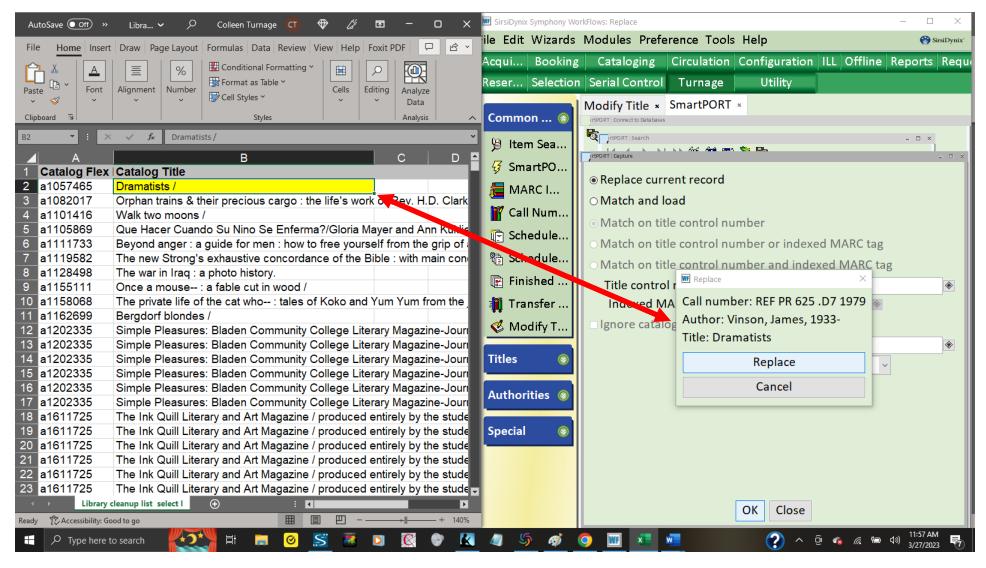
Use the CTRL-V command to paste the # in the SmartPort: Search window. Remove extra letters/digits that preface the actual OCLC# and click on the Search button. OCLC#s are unique, therefore, only one record will come up.



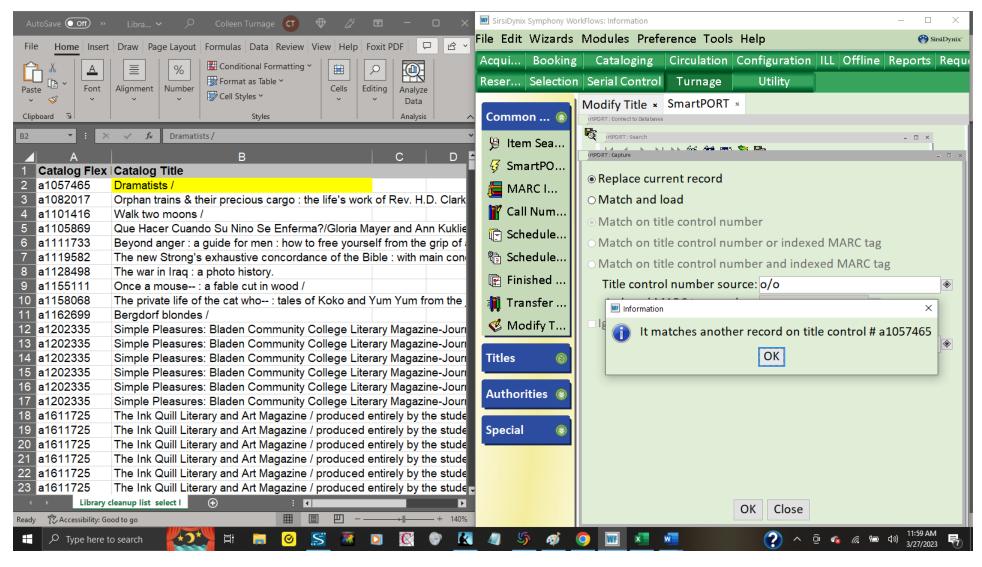
Double-check to be sure the titles match. If they do, then highlight the title in the SmartPort window, and click on the Capture button.



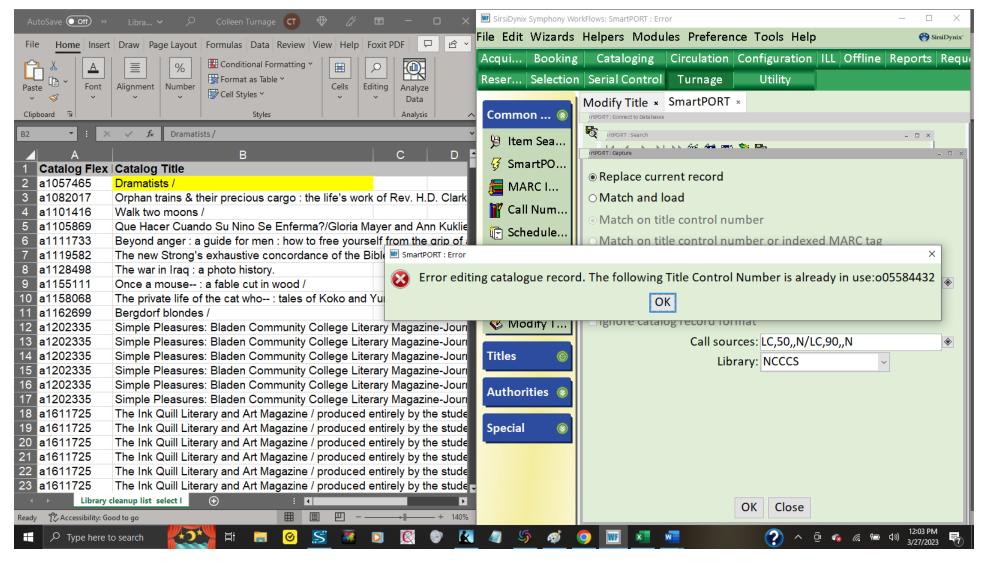
This is the screen in WorkFlows where you can temporarily <u>change your settings</u> from "Match and load" <u>to "Replace current record."</u> SmartPort will stay on "Replace current record" so long as you keep the SmartPort wizard open. Click on the OK button.



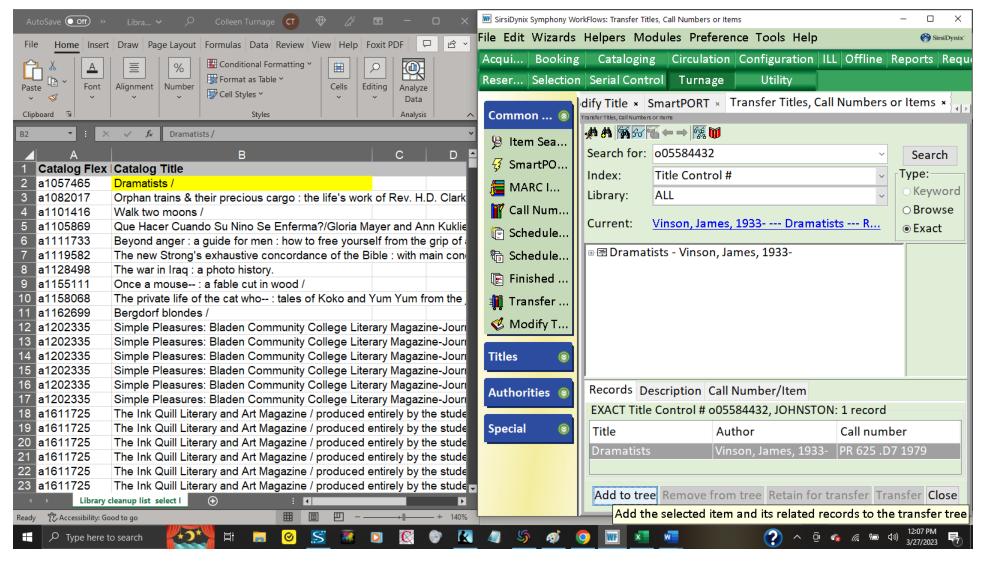
You'll see the Replace window pop up. <u>Be sure you ALWAYS read the title displayed here</u>, because you want to be sure that you really are replacing the title you need to replace! (It is too easy to accidentally open another record in the background, so BE SURE!) Click on the Replace button.



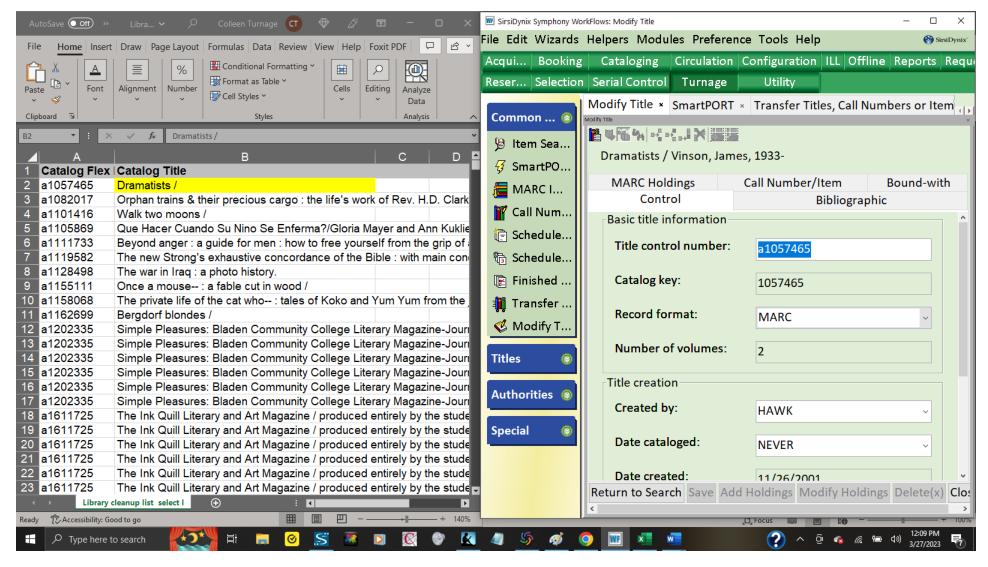
Surprise! It looks like someone-else has already imported OCLC#5584432 to the catalog. Click on the OK button to acknowledge that you've received the message.



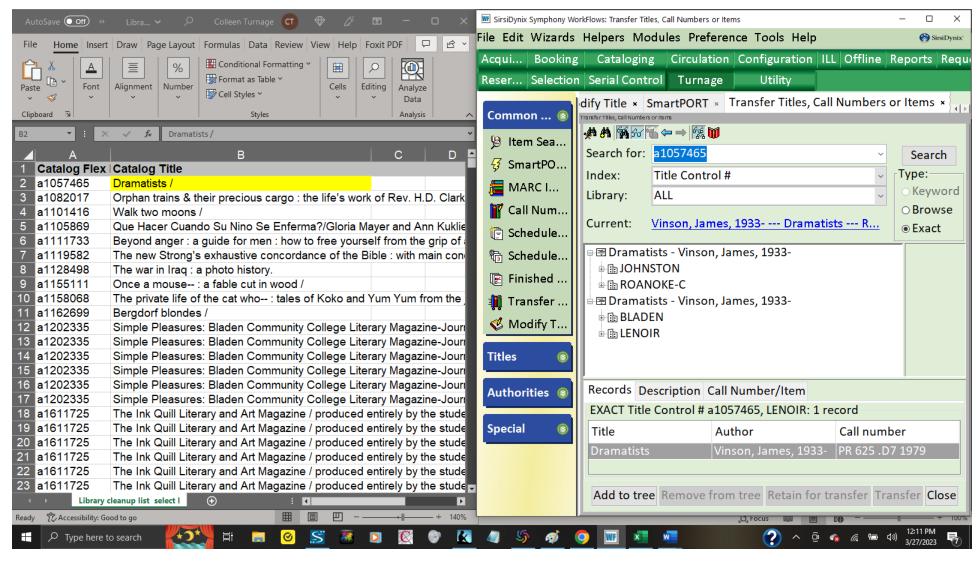
It's the next window that gives you the information you really need: the Title Control # you'll need to use! In this example the number you'd use is o05584432. Be sure to note that number then click on the OK button then Close the SmartPort: Capture window.



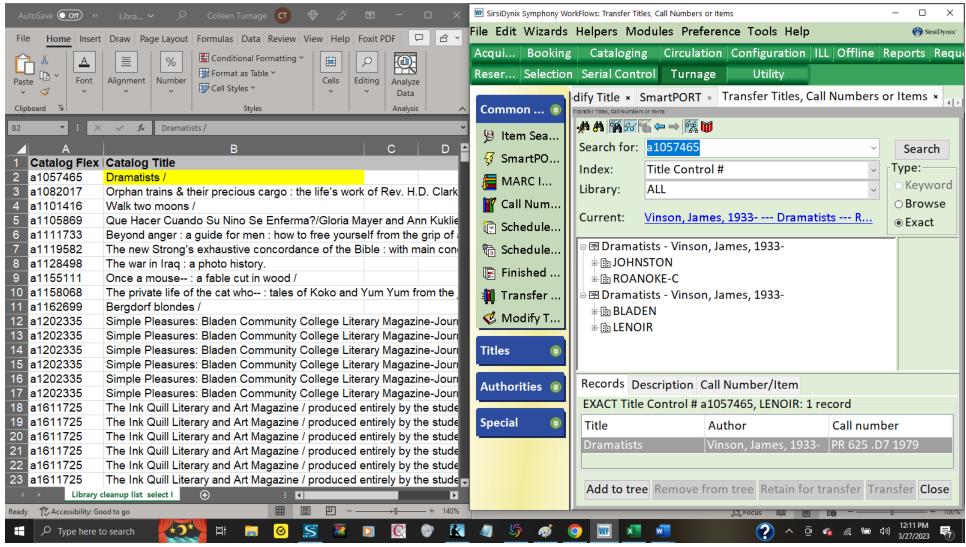
Enter the Title Control # you saw in the previous window in the Search for window. Click on the Search button. You'll see the title displayed at the bottom of the screen. Click on the Add to tree button. You'll then see the title displayed in the center part of the screen, as shown here.



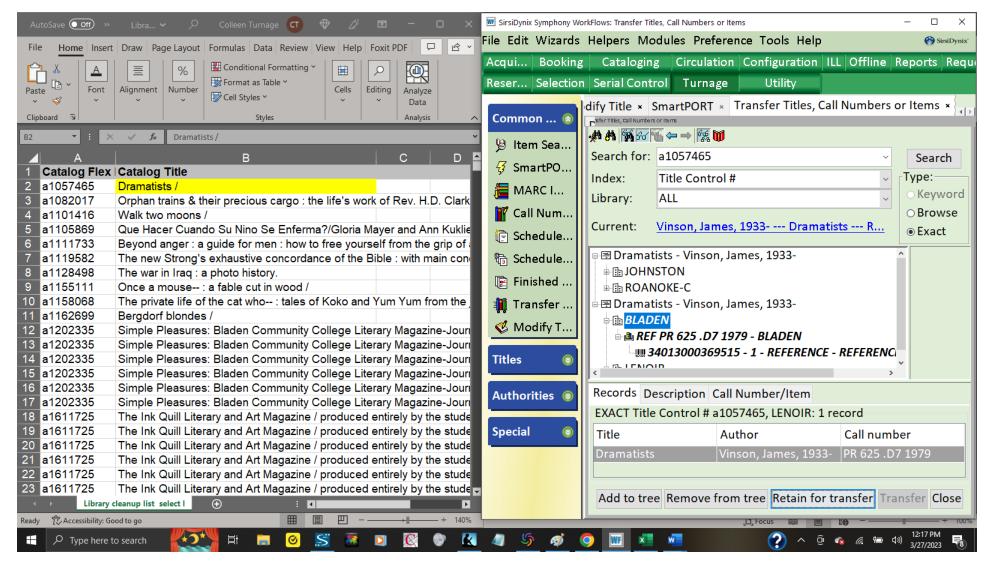
Now toggle back to the Modify Title wizard window. Click on the Control tab folder. Highlight the title control # (as shown here) and use the copy command (CTRL-C).



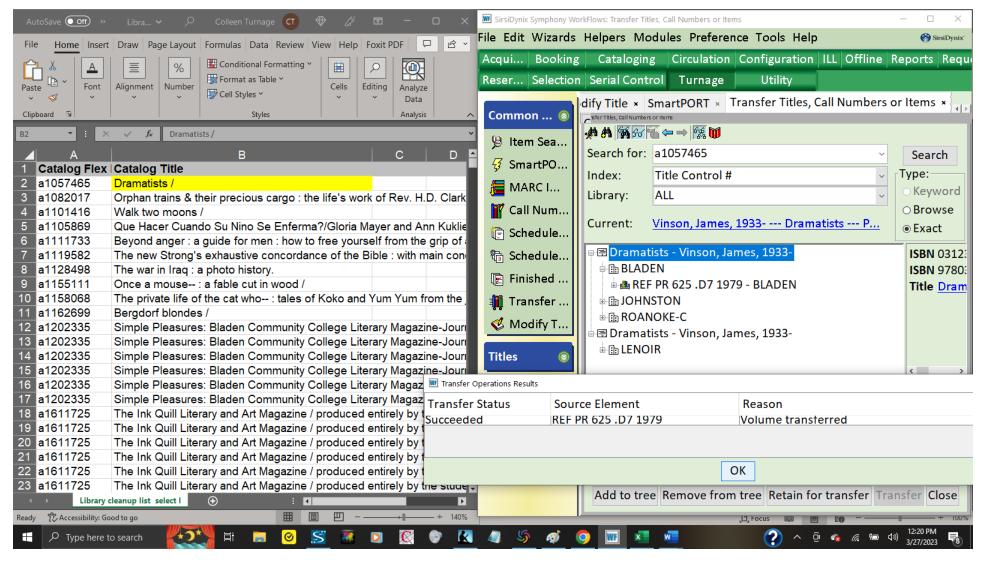
Toggle back to the Transfer Titles, Call Numbers, or Items wizard. Paste the title control # in the Search for window and click on the Search button. The title displays at the bottom of the screen again. Yes, it is identical to the first one (it is, after all, a duplicate title!). Click on the Add to tree button.



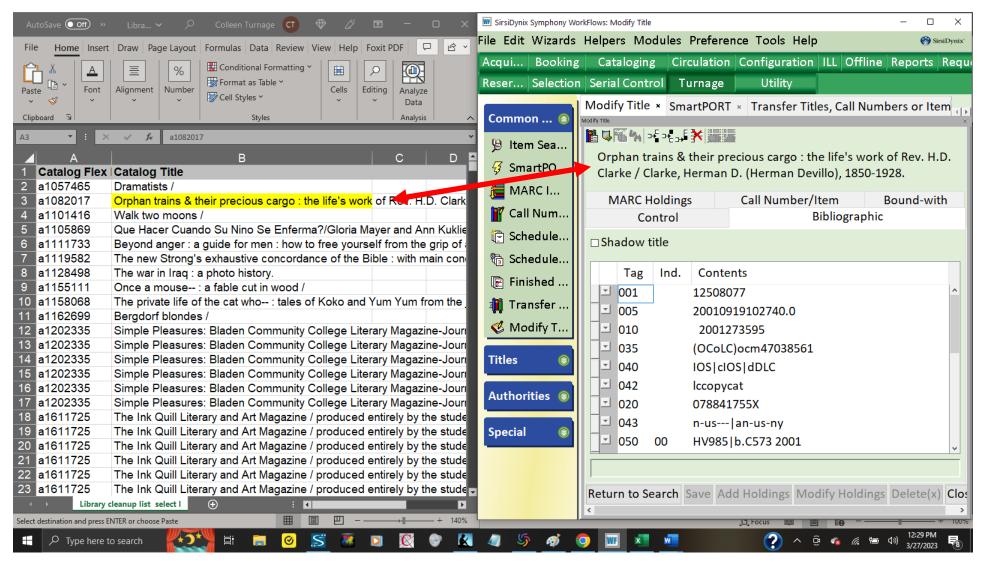
REMEMBER: You added the GOOD record first, so it displays first on the screen. The duplicate non-OCLC record displays second. You can be sure they are different when you click on the + symbol (next to the titles) until it opens the list of libraries attached to it. Note that each title above has two different libraries attached to it.



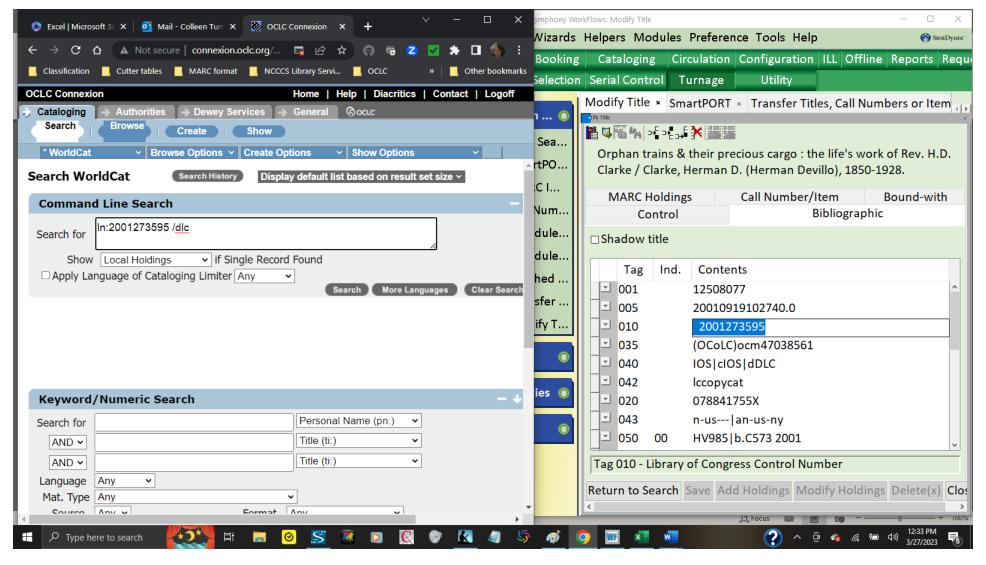
You should only transfer YOUR library's holdings! This example shows BLADEN's report, so it will only show BLADEN's holdings being transferred. You highlight YOUR library, then click on the Retain for transfer button. You will then see your holdings become *italicized*, as shown above.



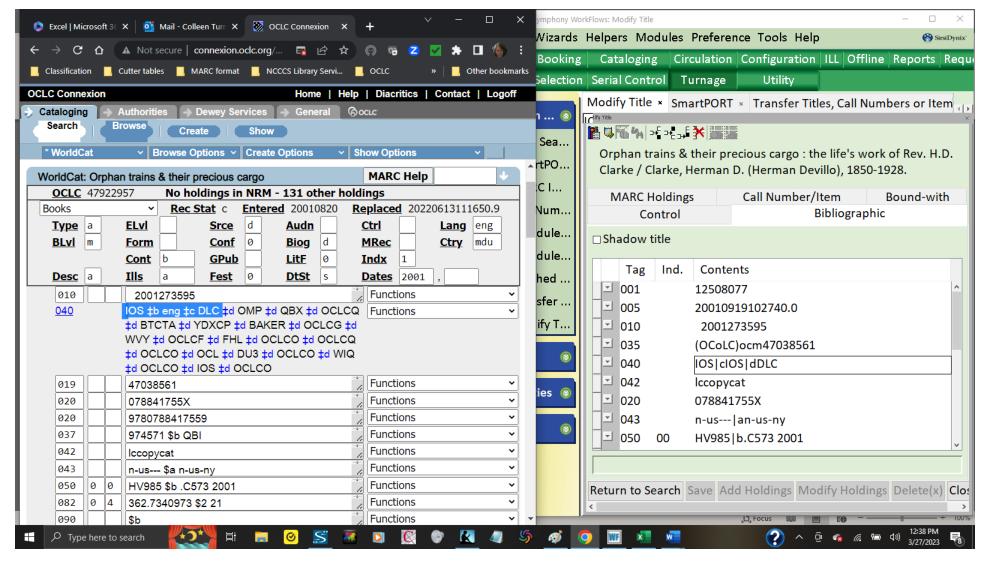
Highlight the first title (it's the good title with an OCLC# for its title control #) and click on the Transfer button (the button grays out when clicked, as shown above). A window pops up letting you know the transfer was successful. Click on the OK button. In the example above you can see that BLADEN's holdings are now attached to the OCLC record in the catalog. You'll want to click on the Remove from tree button until all the items in the center of the Transfer window are gone so that you'll be ready the next time you need to transfer holdings from one record to another.



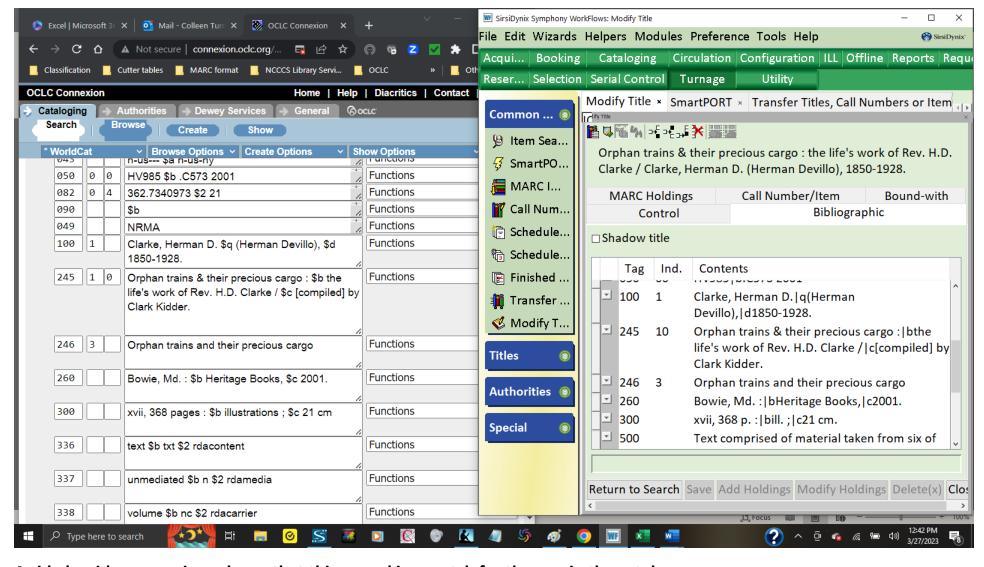
The second title in this particular list displays does NOT show an OCLC# in the MARC tag 001 field. So, you'll have to search for a matching record in OCLC Connexion: https://connexion.oclc.org/. Login to Connexion and click on the Search tab button (in the upper left corner... see screenshot on next page). You'll want to refer to the OCLC Connexion basics document, which can be found on the Library Services web page.



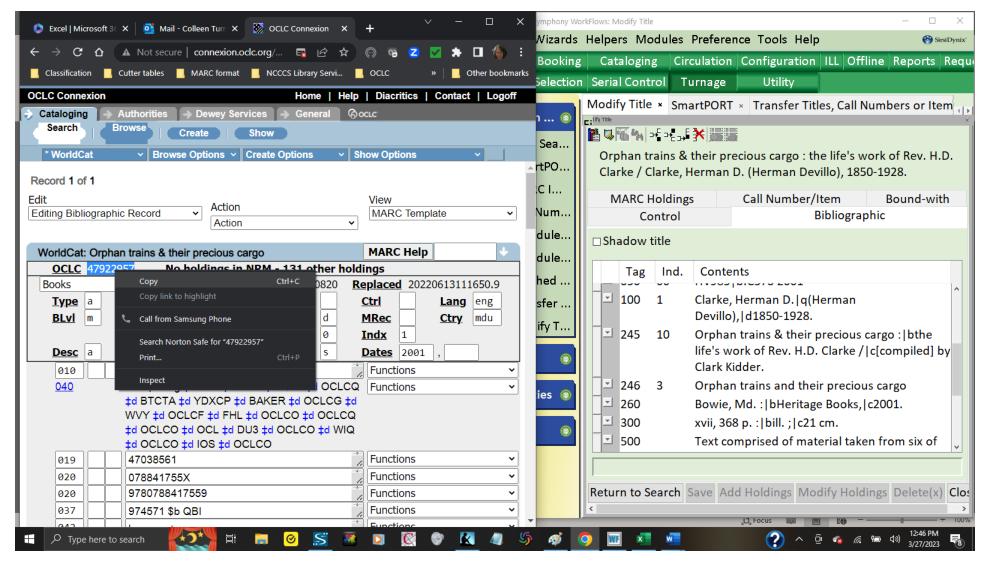
Try a numeric search first. I have found that searching by the LCCN (Library of Congress Control #) or ISBN works best. Then Note the preface used when searching by LCCN (In:). You can limit the results to DLC copy by adding /dlc at the end of the Command Line Search window, as shown above. Click on the gray Search button once you've entered your search terms.



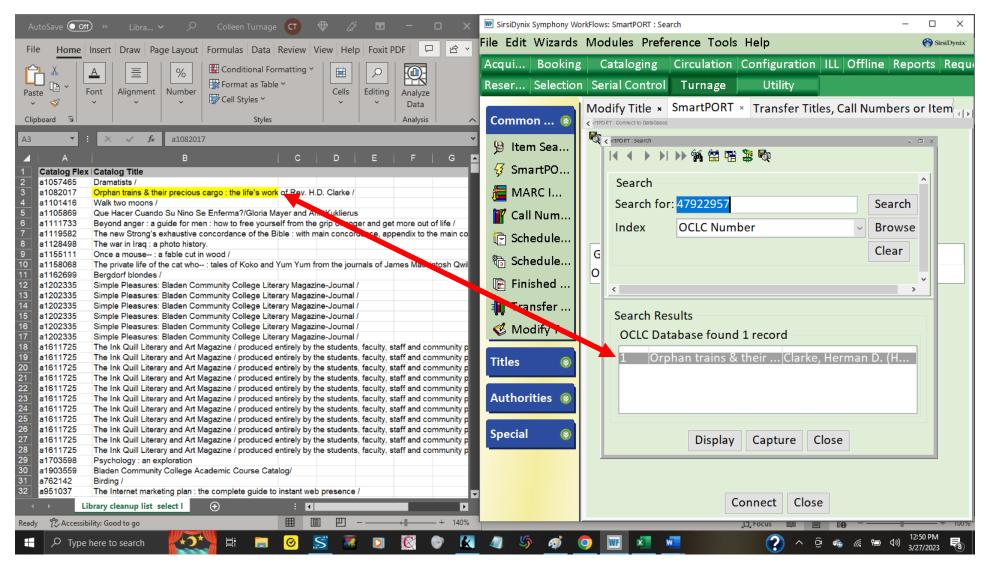
Scroll through the OCLC record and compare it to the record displayed in the catalog. The 040 field shows which library or agency CREATED the record. (You can hover the mouse over the holding code symbols to find out which library or agency is responsible. For example, IOS is the holding code for Davenport Public Library, and DLC is the Library of Congress). Be sure the record matches your copy! Key fields you should match on: Author, Title, Edition Statement, Publication Information, Physical Description. The MARC tags for those are, respectively, 100, 245, 250, 260 or 264, and 300.



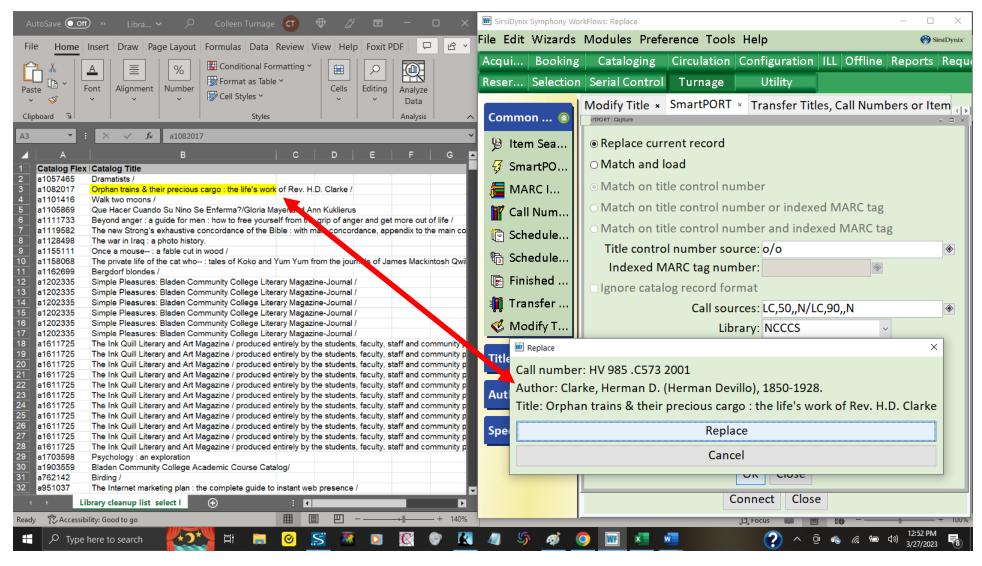
A side by side comparison shows that this record is a match for the one in the catalog.



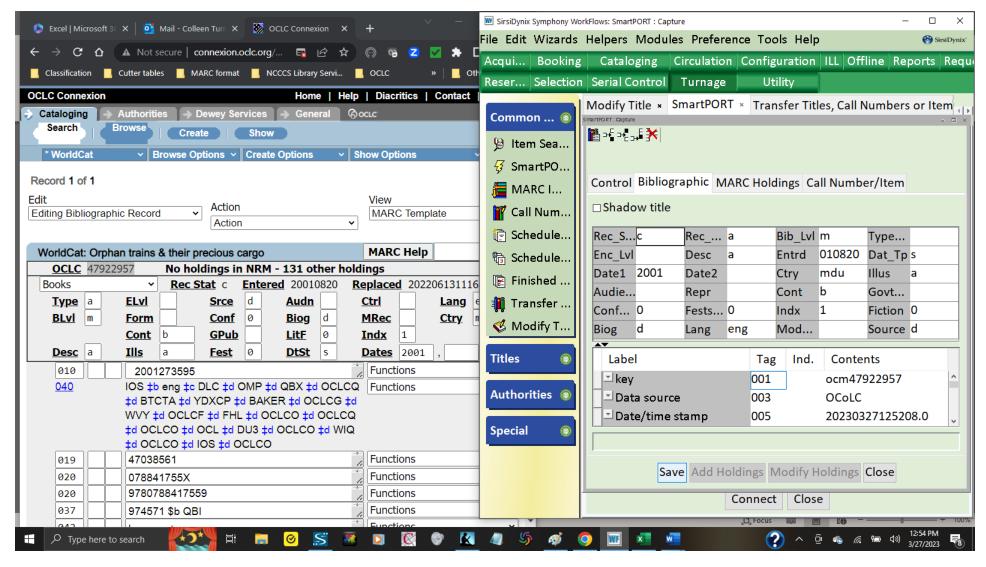
Scroll back up to the top to get the OCLC # for the record. Highlight and use the copy command (CTRL-C) to save the number. (You can also highlight the OCLC# and right click to display and click on Copy, as shown above). The OCLC# for this title is 47922957. That is the # you will enter in the SmartPort wizard.



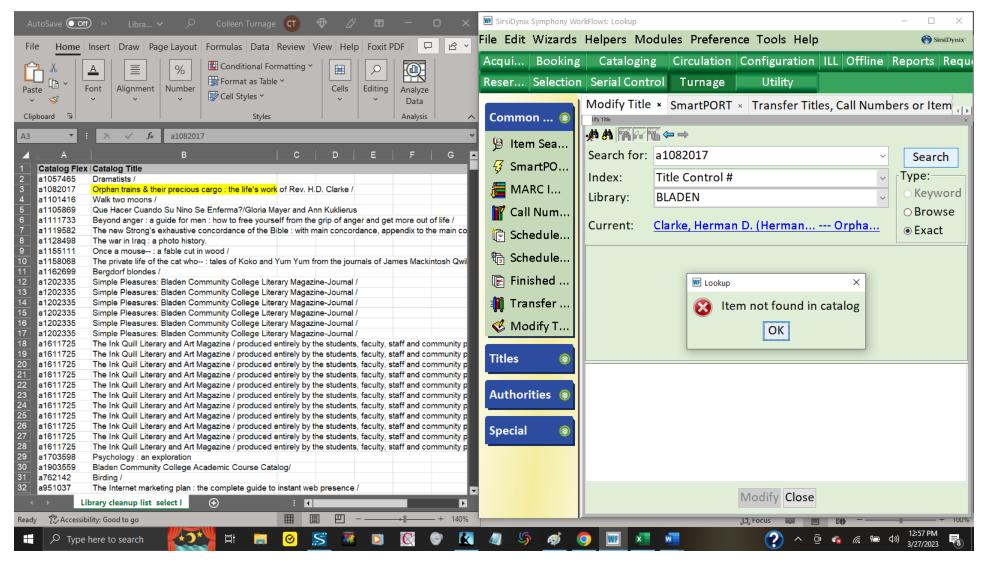
Toggle to the SmartPort wizard. Be sure to compare the title that displays in SmartPort with the title from your report list. This helps you check behind yourself. Click on the Capture button.



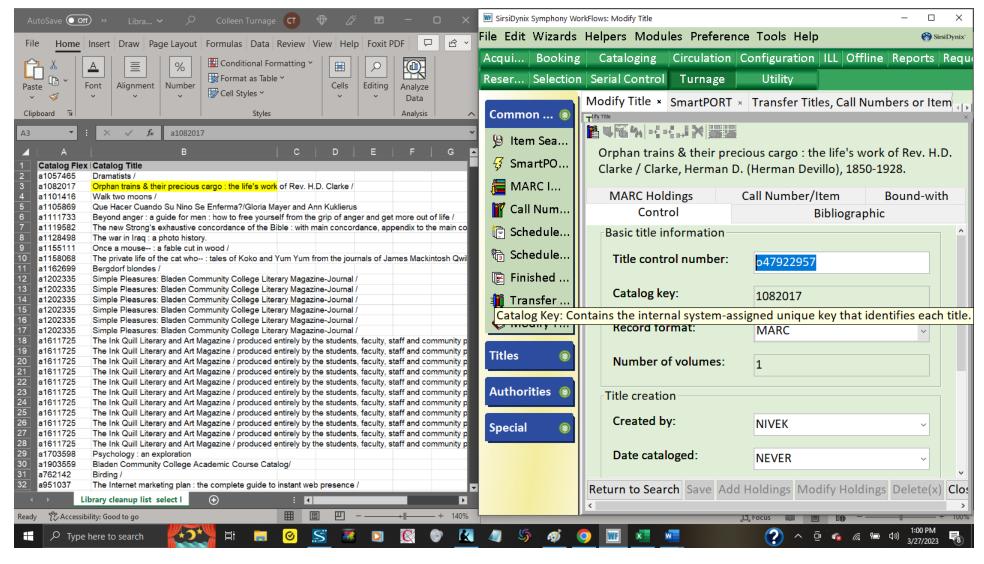
Click on the Replace button when the Replace window displays. (This is your final check to be sure you're really replacing the correct non-OCLC record in the catalog with OCLC copy)



This is what you want to see. The MARC record displays in WorkFlows (with no warning messages!). All you have to do is click on the Save and Close buttons of the SmartPort: Capture window.



Click on the Modify Title wizard tab again and Return to the search screen. You'll know the record was replaced by either clicking on the blue hyperlink by Current: or by clicking on the Search button. An "Item not found in catalog" message will display because (technically) the title control # for a 1082017 no longer exists in the catalog.



Notice that when you open the Control tab folder of the record, its new title control # is o47922957. Notice, too, the Catalog key for this record: 1082017. That catalog key hearkens back to the old title control # a1082017.

And just like that... you're ready for the next title in your report list! (Note: You can opt to highlight titles from your report when those titles are done or you can opt to hide the completed rows so that the next title you have to do displays first.)

These are the two processes you'll use the most when doing your part to clean up the library catalog. Good luck!