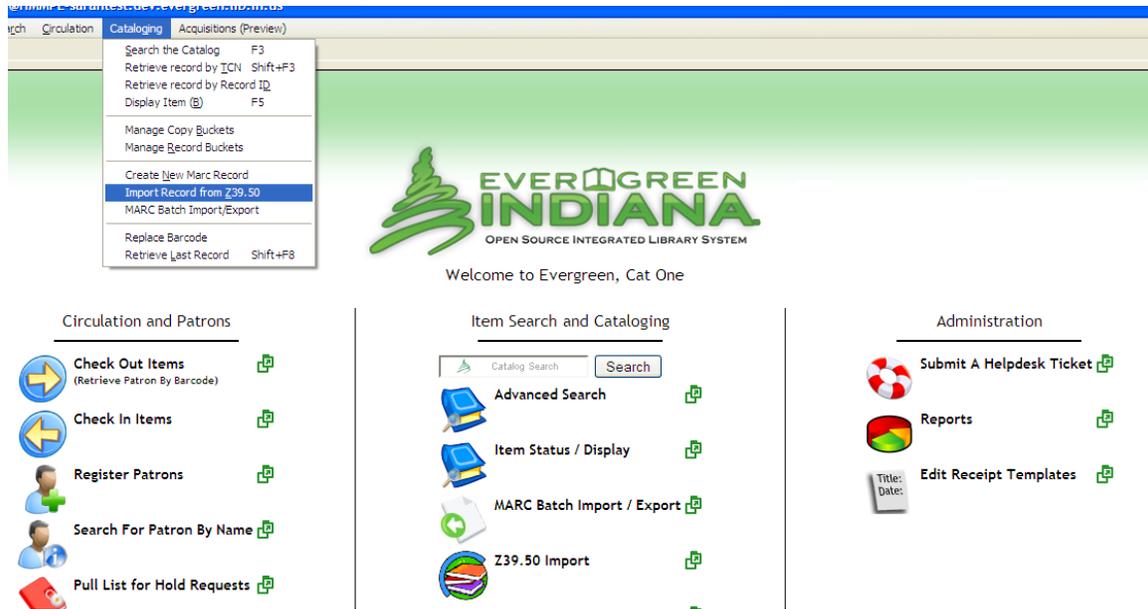


Chapter 12 -- Adding New Records via Z39.50

Z39.50 Search Screen Features

To access the Z39.50 search screen, click on the **Z39.50 Import** icon on the splash screen, or go to the **Cataloging** menu (**Alt + G**) on the top menu bar and select **Import Record from Z39.50 (Alt + Z)**.



Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

The search screen for Z39.50 retrieval will display:

MARC Import via Z39.50

Query
Tip: Click a search field label and then the 'Save as Default' button to have that field focused by default.
Item Type: All Formats

Service and Credentials

Service	Username	Password
<input type="checkbox"/> Local Catalog		
<input type="checkbox"/> ITSMARC LC MARC English Backfile		
<input type="checkbox"/> ITSMARC CanMARC		
<input checked="" type="checkbox"/> ITSMARC LC MARC Foreign		
<input type="checkbox"/> ITSMARC DocuFile		
<input type="checkbox"/> #comment		
<input type="checkbox"/> ISL		
<input type="checkbox"/> OCLC		
<input type="checkbox"/> ITSMARC Contributed Schools and Publics		
<input type="checkbox"/> ITSMARC TheoMARC		
<input type="checkbox"/> ITSMARC Last 5 days LC MARC English		
<input type="checkbox"/> ITSMARC MedMARC		
<input type="checkbox"/> ITSMARC Spanish MARC		
<input type="checkbox"/> biblios.net		
<input type="checkbox"/> Seattle Public Library		
<input type="checkbox"/> Brodart		
<input type="checkbox"/> ITSMARC Asian MARC		

Results

Fetch More Results | List Actions | No record marked for overlay.

Author	Edition	ISBN	Publication ...	Publisher	Ser ...	TCN	Title
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Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

The **Service and Credentials** box on the top-right hand side of the screen lists various the various Services which may be searched for bibliographic records, including the local catalog. Clicking on the boxes next to the names of the services allows you to select as many services as you wish to search simultaneously. A green check mark indicates you have selected the Service.

Service	Username	Password
<input type="checkbox"/> Local Catalog		
<input type="checkbox"/> ITSMARC LC MARC English Backfile	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC CanMARC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC LC MARC Foreign	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC DocuFile	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> #comment	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ISL	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> OCLC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC Contributed Schools and Publics	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC TheoMARC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC Last 5 days LC MARC English	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> ITSMARC MedMARC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC Spanish MARC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> biblios.net		
<input type="checkbox"/> Seattle Public Library	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Brodart	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC Asian MARC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC LC MARC English	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> OCLC	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC Contributed Research and Academics	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> ITSMARC AV Access	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Library of Congress		
<input type="checkbox"/> Kansas City Public Library	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> PINES Data	<input type="text"/>	<input type="text"/>

NOTE: Some services require a user name and password and you will have input boxes next to the service name. If your local library does not have a subscription to these services, you will not be able to access them. If you do have a subscription, you may need to contact your vendor for your user name and password. Not all the services with input boxes next to them require a user name and password.

Last Updated: 10/12/2009
Version 1.6.0.0

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

Service	Username	Password
<input checked="" type="checkbox"/> Local Catalog		
<input type="checkbox"/> ITSMARC LC MARC English Backfile		
<input type="checkbox"/> ITSMARC CanMARC		
<input type="checkbox"/> ITSMARC LC MARC Foreign		
<input type="checkbox"/> ITSMARC DocuFile		
<input type="checkbox"/> #comment		
<input type="checkbox"/> ISL		
<input checked="" type="checkbox"/> OCLC	100-216-057	*****
<input type="checkbox"/> ITSMARC Contributed Schools and Publics		
<input type="checkbox"/> ITSMARC TheoMARC		
<input type="checkbox"/> ITSMARC Last 5 days LC MARC English		
<input type="checkbox"/> ITSMARC MedMARC		

Save as Default

Once you have made your choices, clicking the **Save as Default (Alt +D)** button in the Service and Credentials box allows you save the services you usually search and any user names and passwords you have entered. They will be automatically selected the next time you open the Z39.50 screen.

The **Query** box on the top left displays the input fields used in searching your Services for bibliographic records. If you have not selected any Services, there will be no active search fields:

MARC Import via Z39.50

Query

Tip: Click a search field label and then the 'Save as Default' button to have that field focused by default.

Item Type: All Formats

Raw Search Clear Form Search

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

The active search fields also change depending on the Services you select. For instance, Keyword and Subject will only be active if the local catalog is selected. When you select multiple Services to search, an active box may apply to only one service.

The screenshot shows the 'MARC Import via Z39.50' interface. On the left is the 'Query' section with a tip: 'Tip: Click a search field label and then the 'Save as Default' button to have that field focused by default.' Below the tip are search fields for Item Type (set to 'All Formats'), LCCN, Pub Date, Author, ISSN, ISBN, Title, TCN, Publisher, Keyword, and Subject. At the bottom of the Query section are buttons for 'Raw Search', 'Clear Form', and 'Search'. On the right is the 'Service and Credentials' section with a 'Service' list: 'Local Catalog' (checked), 'OCLC' (checked), 'Library of Congress' (unchecked), and 'biblios.net' (unchecked). A 'Save as Default' button is at the bottom right.

The Item Type field allows you to narrow your search by format. It is a drop down list. Click on the blue arrow to view the format selections. Then highlight the format you'd like to search. You can either search All Formats or choose one format at a time. You cannot select more than one specific format.

This screenshot is similar to the previous one but with the 'Item Type' dropdown menu open. The menu lists the following options: 'All Formats', 'Books', 'Serials', 'Visual materials', 'Sound recordings' (highlighted in blue), 'Musical scores', 'Maps', 'Computer files', 'Mixed material', 'Internet Resources', and 'Papers or Articles'. The rest of the interface, including the 'Service and Credentials' section, remains the same as in the previous screenshot.

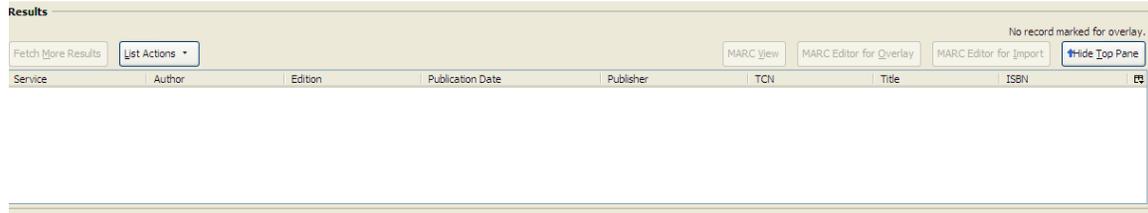
There are three buttons along the bottom of the **Query** box. On the right is the search button. When you have input your desired search terms into any of the various Input fields, click the **Search (Alt + S)** button to perform your search. Clicking the **Clear Form (Alt + C)** button clears any search terms from the input fields.

Evergreen Indiana Cataloging Training Manual

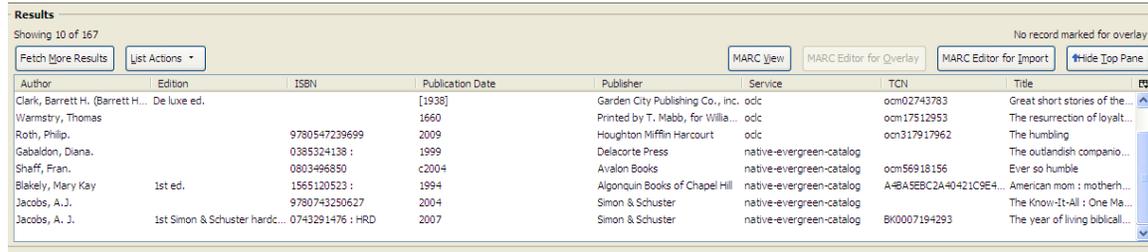
Chapter 12 – Adding New Records via Z39.50

On the left is the **Raw Search (Alt + W)** button. Clicking it brings up a dialog box with an input field for PQN searches. See **Raw Searches** on page 12.20 for more information.

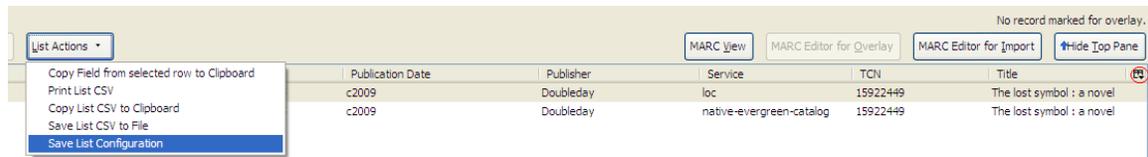
Across the bottom of your screen you'll see the results box:



After you perform a search, your search results will be displayed here:



Information about each record retrieved appears on a separate summary line, with various columns of information. The Service column indicates where the record was found. If “native-evergreen-catalog” is listed in the service column, the record is in Evergreen Indiana catalog.



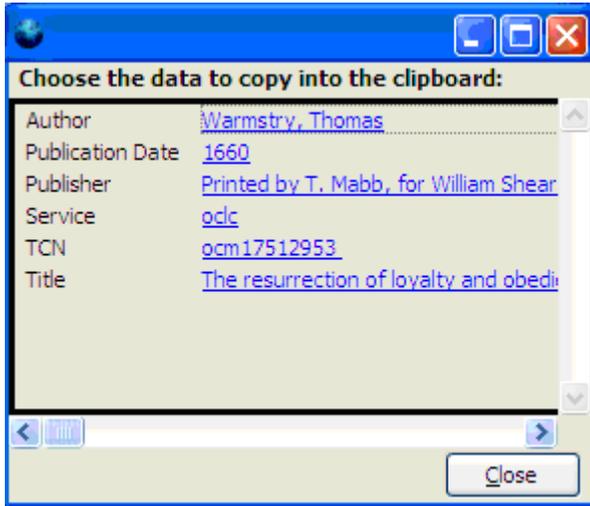
There is a **Column Picker** on the right side of the Results box. Once you have set your columns as desired, you can save them by clicking the **List Actions (Alt + L)** button, on the left hand side of the screen, and selecting **Save List Configuration**. For further information on the Column Picker, see **Chapter 4-- Using the Column Picker**.

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

The **List Actions (Alt + L)** button also allows you to work with the data displayed in the Results box in a few different ways.

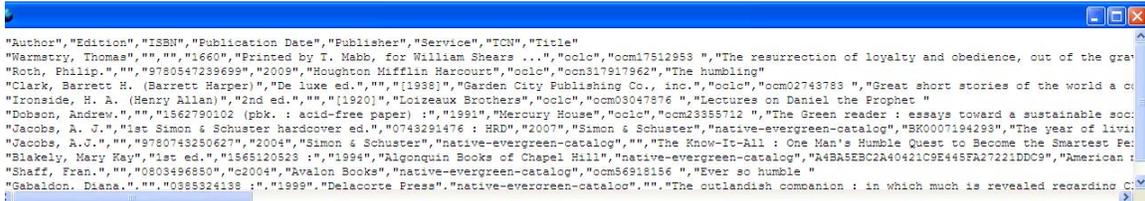
You can select **Copy field from selected row to Clipboard** to bring up the clipboard:



You can click on any of the blue text to copy that field. A dialog box will tell you what you have copied to the clipboard. Click **OK** or press **Enter**, and the clipboard will close. You can then paste what you have copied wherever your cursor is by typing **Ctrl + V**.

TIP: It will copy the whole field, so if you copy an ISBN with a colon or extra characters at the end you will need to delete them when you paste if you want to search by ISBN.

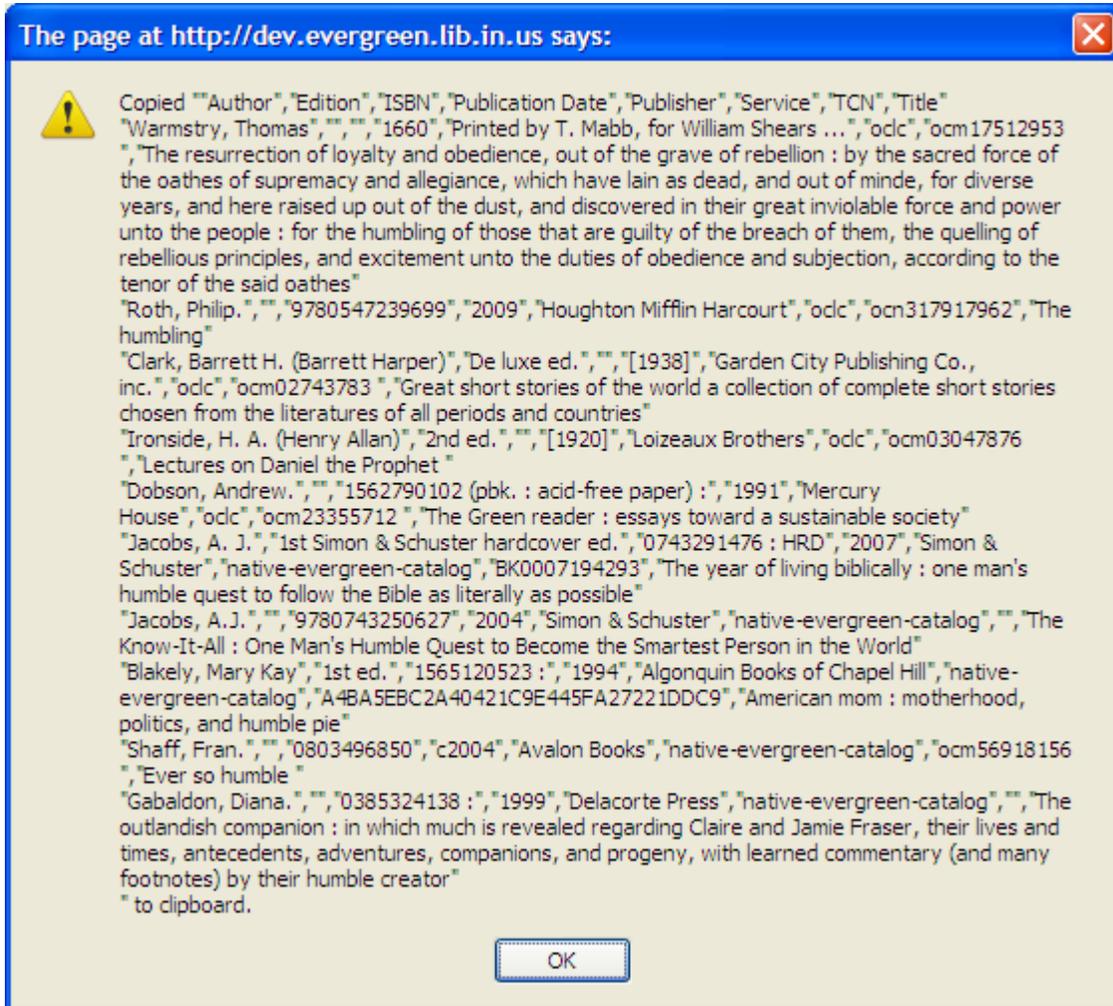
Selecting **Print List CSV** from the **List Actions (Alt + L)** button allows you to print all the information displayed in the results box. It will print formatted as shown below:



Evergreen Indiana Cataloging Training Manual

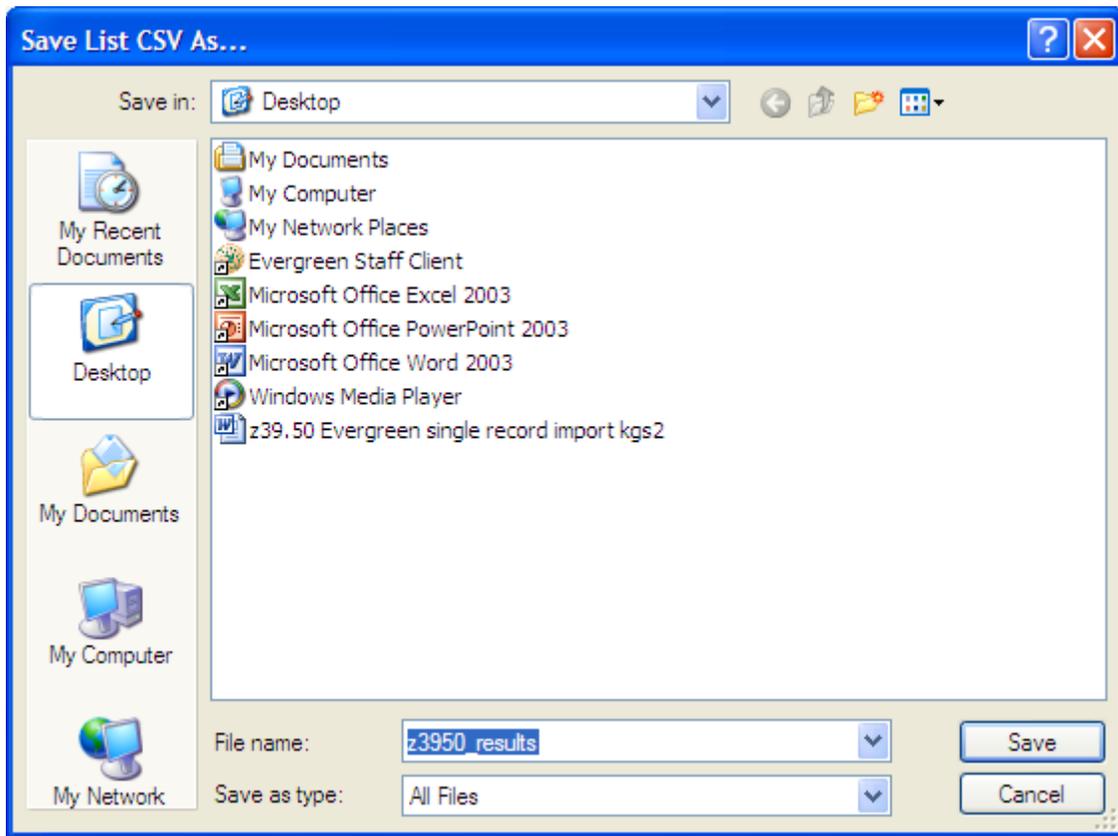
Chapter 12 – Adding New Records via Z39.50

If you wish to reformat the information before printing, you can choose **Copy List CSV** to clipboard and paste it into a file. A dialog box will pop up notifying you the list has been copied:



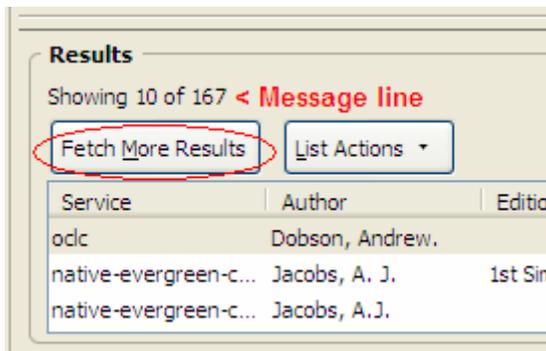
Click **OK** or press **Enter** and type **Ctrl + V** to paste the information where your cursor is. For instance, you can paste the information in a Word Document.

Finally, you can select **Save List CSV to File** to save the information. A save window will open up:



You can save the information where you like, and rename the file if you wish. By default the file will be saved as a text file.

In addition to the **List Actions (Alt + L)** button, on the left side of the **Results** box you'll see the **Fetch More Results (Alt + M)** button.

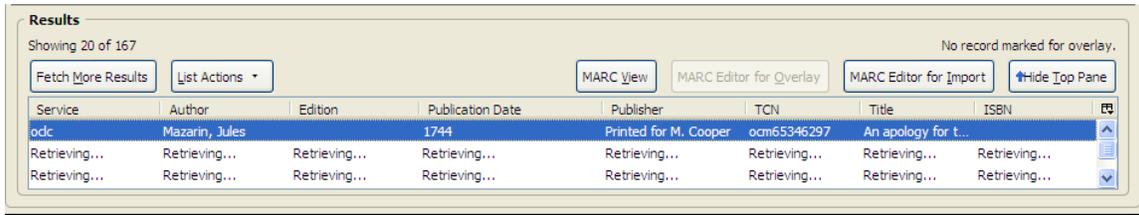


By default, the results screen displays the first 10 results of your search. If you have more than 10 search results, the number will be displayed in a message line at the top left of the **Results** box. Here it is showing 10 of 167 results. By clicking the **Fetch More Results (Alt + M)** button, 10 more results will be displayed.

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

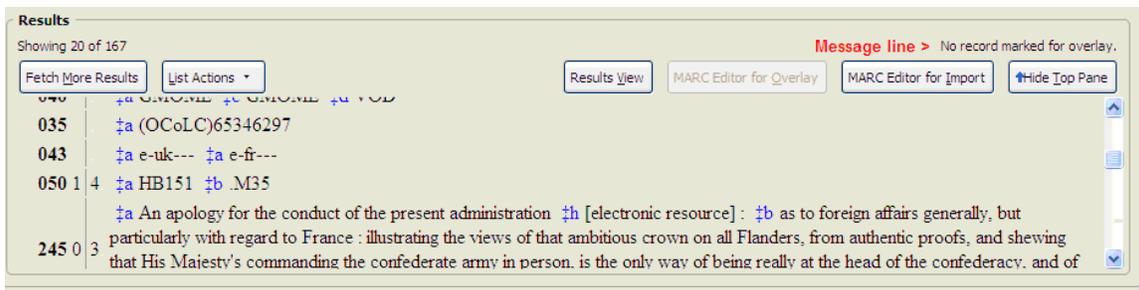
Your first 10 results will still appear in the box. The results box will expand to display more results using the scroll bar on the right.



It may take a moment for the results to display. The message line will say “Retrieving...” and then will update to say how many results are being displayed.

On the right side of the results box there are four more buttons and an additional message line.

The first button is the **MARC View (Alt + V)** button. Clicking this will display the MARC record of the high-lighted search result as seen below:



To return to your list of search results, click the **Results View (Alt + V)** button, which replaces the **MARC View (Alt + V)** button in this view.

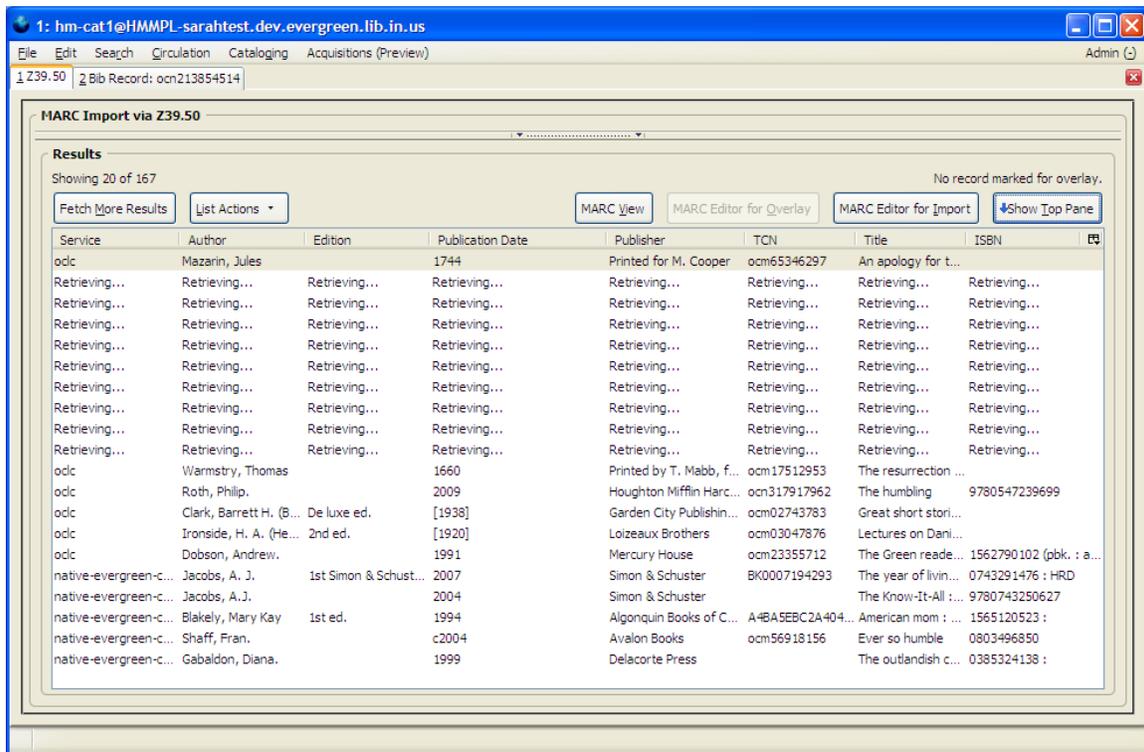
The second button is the **MARC Editor for Overlay (Alt + O)** button. Unless a record has been marked for overlay, it will be inactive as seen above, and the message line on the right will read “No record marked for Overlay.” See **Chapter 13--Overlaying Records** for more information.

The third button is the **MARC Editor for Import (Alt + I)**. Clicking this button opens the highlighted record in the MARC editor to begin the import process.

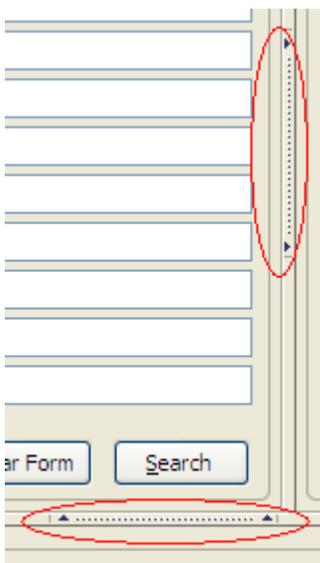
Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

The fourth button is the **Hide Top Pane (Alt + T)** button. This button hides the **Query** and **Service and Credentials** boxes as seen below:



This is really useful for viewing MARC records and if you have a lot of search results. To view the **Query** and **Service and Credentials** boxes again, simply click the **Show Top Pane (Alt + T)** button, which replaces the **Hide Top Pane** button in this view.



You can also resize the boxes on the Z39.50 screen by clicking and dragging the resize lines between each box. Vertical lines can be dragged right or left and horizontal lines can be dragged up and down. Your changes will not be saved for the next time you open the screen, however.

Importing a Record via Z39.50

The Z39.50 tool allows you to search for and import records into the catalog one at a time. You can simultaneously search the local catalog to see if there is a matching record already in the system.

First, open the Z39.50 screen by clicking on the **Z39.50 Import** icon on the splash screen, or go to the **Cataloging** menu (**Alt + G**) on the top menu bar and select **Import Record from Z39.50 (Alt + Z)**.

Next in the **Services and Credentials** box, click on the boxes next to the services you'd like to search to select them. Enter any user names and passwords, if necessary.

Service	Username	Password
<input checked="" type="checkbox"/> Local Catalog		
<input checked="" type="checkbox"/> OCLC	100-216-057	••••••
<input type="checkbox"/> Library of Congress		
<input type="checkbox"/> biblios.net		

NOTE: Searching many sources at once may slow down the search process.

Then enter your search terms into the input fields in the Query Box:

Tip: Click a search field label and then the 'Save as Default' button to have that field focused by default.

Item Type	All Formats
Keyword	
Pub Date	
Subject	
Author	
ISSN	
Title	
ISBN	9780547239699
Publisher	
TCN	
LCCN	

Raw Search Clear Form Search

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

For books, you will generally search by ISBN, but other search options should be used if no results are found with an ISBN search. You can limit your search by entering information in more than one box, such as title, author, and publication date. You can also narrow your results to a particular format by selecting an Item Type from the drop down list.

*TIP: See **Raw Searches** on page 12.20 for information on searching by UPC.*

TIP: You can use the TCN box to search OCLC by OCLC number if you enter the number without the ocn/ocm prefix.

Enter the data you wish to search and click the **Search (Alt + S)** button.

*NOTE: Your last search will be retained in the boxes, so when you switch from using one search field to another, remember to click **Clear Form (Alt + C)**, next to the Search button.*

After you perform a search, your search results, if any, will appear in the **Results** box, as shown below:

The screenshot shows the 'MARC Import via Z39.50' search form. The 'Query' section includes fields for Keyword, Pub Date, Subject, Author, ISSN, Title, ISBN (9780385504225), Publisher, TCN, and LCCN. The 'Service and Credentials' section has checkboxes for Local Catalog, OCLC (with username 100-216-057 and password *****), Library of Congress, and biblios.net. Below the form is a 'Results' section showing 2 of 2 records in a table.

Author	Edition	ISBN	Publication Date	Publisher	Service	TCN	Title
Brown, Dan	1st ed.	9780385504225	c2009	Doubleday	loc	15922449	The lost symbol : a novel
Brown, Dan	1st ed.	9780385504225	c2009	Doubleday	native-evergreen-catalog	15922449	The lost symbol : a novel

To view the MARC record for your search results, highlight the desired record, and click the **Marc View (Alt + V)** button, as seen below:

This close-up screenshot of the 'Results' section shows the table from the previous image. The 'MARC View' button is circled in red, indicating it should be clicked to view the MARC record for the selected record.

Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

NOTE: If a matching record is found in the local catalog it will say “native-evergreen-catalog” in the service column. Do not import another record, and do not try to import the “native-evergreen-catalog” record. In most cases this will simply result in a record collision, but in some cases a duplicate record will be imported. Instead, add your holdings to the existing record. You can copy the record TCN to the clipboard and use that to search for the record from the Advanced Search screen. If the existing record is incomplete, it can be overlaid with an imported record. See **Chapter 13—Overlaying Records**.

NOTE: Records in the local catalog which have no holdings will not be displayed in your search results, but will cause a Record Collision if the TCN is the same as the record you are trying to import. .

The MARC record will appear in the Results box:

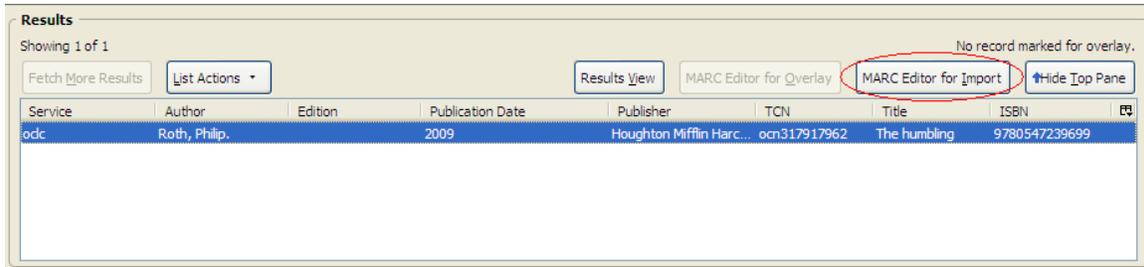
TIP: To make the **Results** box larger and view more of the record at once, click the **Hide Top Pane (Alt + T)** button.

To return to the Results list, click the **Results View (Alt + V)** button.

Returning to the Results View will allow you to look at any other records retrieved in your search.

Evergreen Indiana Cataloging Training Manual

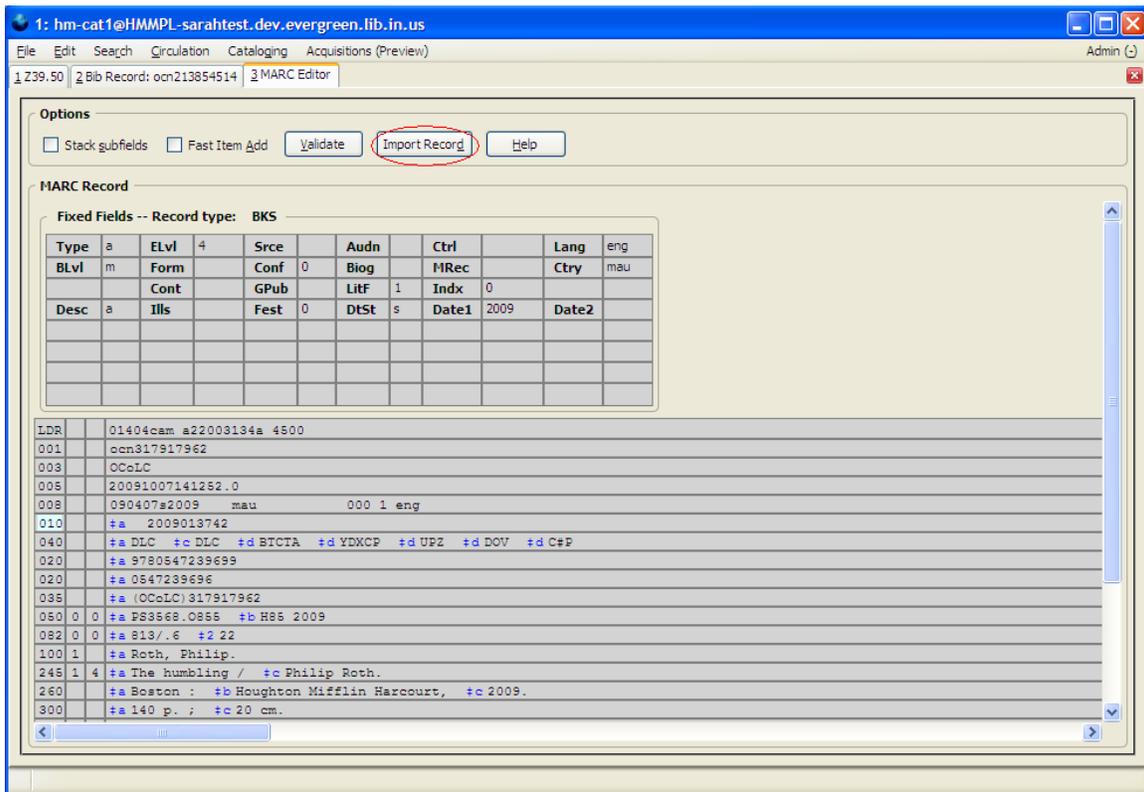
Chapter 12 – Adding New Records via Z39.50



Once you have determined that a record is a match for your item, highlight the item you wish to import, and click the **MARC Editor for Import (Alt +I)** button on the right.

TIP: You can also Import records from the MARC view screen.

A new tab will open up displaying your record in the MARC Editor:



*TIP: If no tab opens when you try to import a record, you may have too many tabs open. If you have imported a lot of records in one session, you will need to remember to close some of the tabs (**Ctrl + W**). Since a new tab opens every time you import a record, eventually you will reach the limit of 9 tabs. If you have 9 tabs open, nothing will happen when you click MARC Editor for Import.*

When the MARC editor opens, you can do any necessary editing to the record before it is imported. See **Chapter 14—Using the MARC Editor**.

*TIP: At this point you can also do a **Fast Item Add**. See page 12.18*

Once you have edited the record as needed, click on the button labeled **Import Record (Alt + D)** to import your edited record. If you close the tab before importing the record, it will not be added to the catalog, and you will lose any edits you have made.

After you click **Import Record (Alt + D)**, a dialog box should open up telling you that the record was successfully imported:

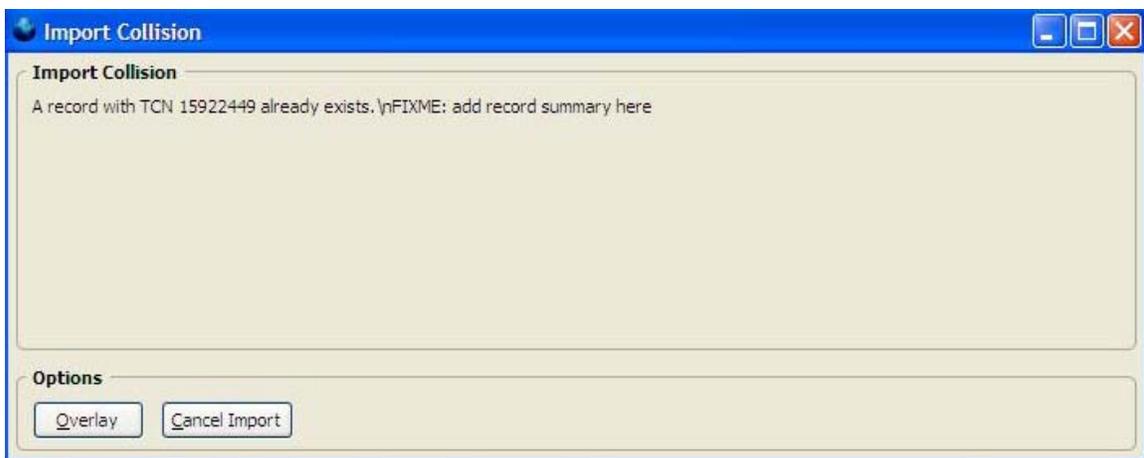


Click on **OK** or press **Enter**.

The bibliographic record will be added to the system and will open in the current tab in your default view. At this point you can do further MARC editing if desired, and local holdings, if you have not done this with **Fast Item Add**. See **Chapter 5 -- Adding Holdings**.

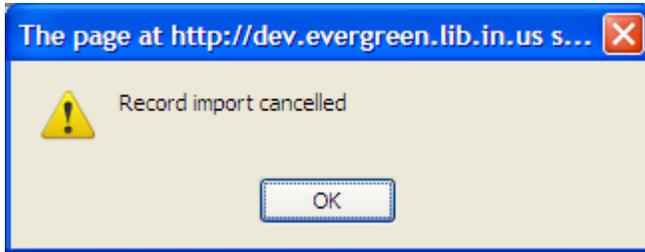
Record Collisions

If a record already exists in the system with the same TCN, instead of the dialog box telling you that the record has been imported, you will get the following Alert:



NOTE: A record collision will only occur if a record in the system has the same TCN. If there is a duplicate record in the system with a different TCN, your record will still import successfully and will need to be merged with the existing record. See Chapter 19—Merging Records if needed.

If you click the **Cancel Import (Alt + C)** the record will not be imported and you'll get the following dialog box:



You can then use the TCN to search for the record in the system to add your holdings,

If you click the **Overlay (Alt +O)** button, you will replace the record with the same TCN that is already in the system with the record you are importing.

The following dialog box will display:



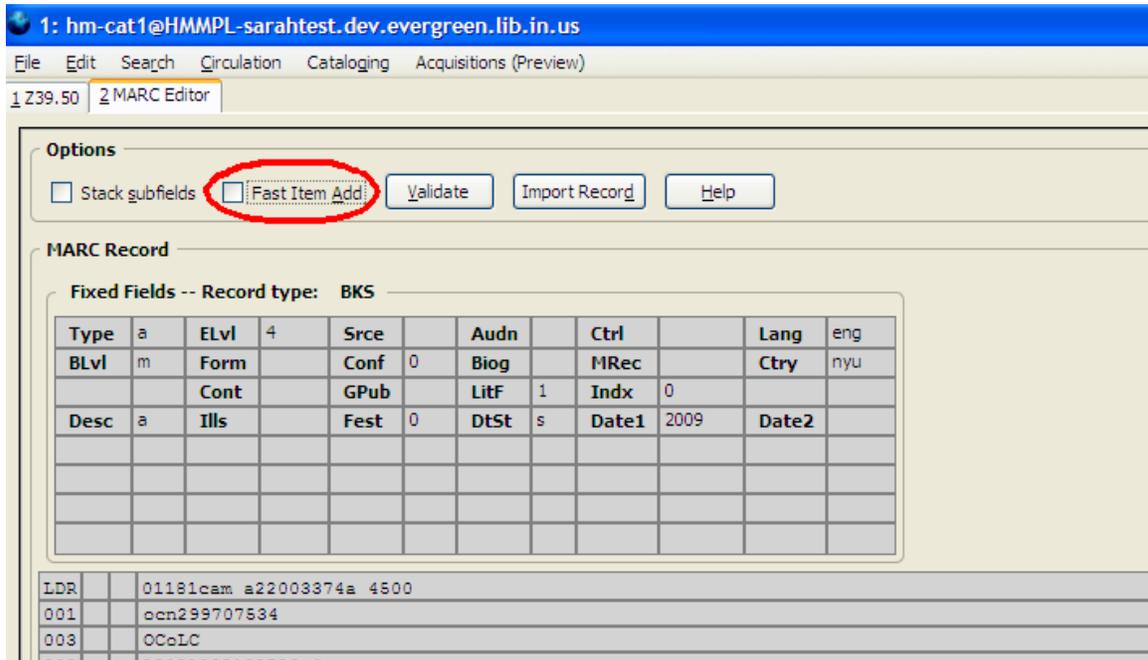
NOTE: The record to be overlaid will not be displayed and you will not have the option to cancel the overlay.

TIP: You may wish to look up the record in the system before overlaying to make sure you do not lose edits that have been made to the local record.

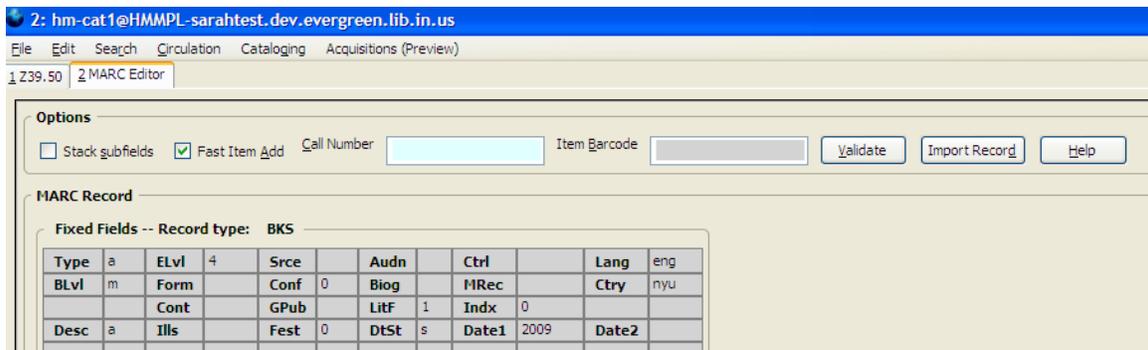
Fast Item Adds

When importing records, you can quickly and easily add a single holding to your library branch using the **Fast Item Add**. When the MARC Editor opens during the import process, you will see a checkbox labeled **Fast Item Add** under **Options**.

Click the **Fast Item Add (Alt + A)** box to select it.



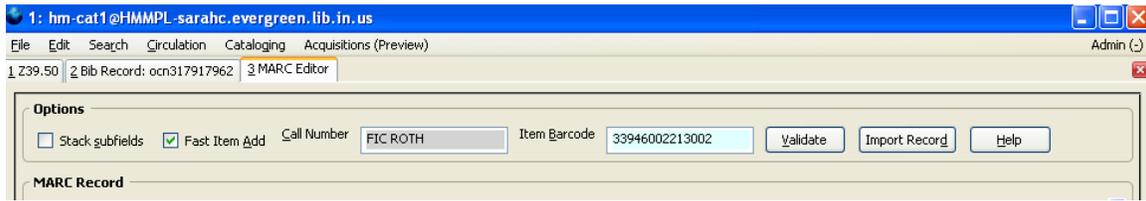
Boxes for a Call Number and an Item Barcode will appear:



Evergreen Indiana Cataloging Training Manual

Chapter 12 – Adding New Records via Z39.50

Enter your Call Number and Barcode into the correct boxes:

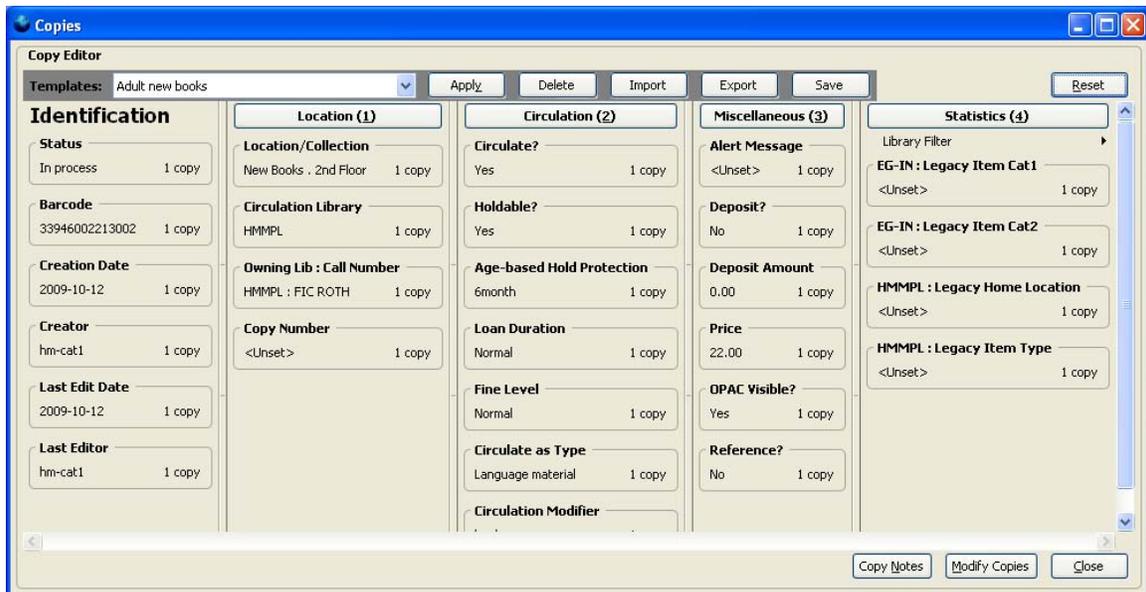


Then, if you have made all the edits you desire to the MARC record, click **Import Record (Alt + D)**.

A dialog box will inform you if the record has been successfully imported. If you get an Import Collision Alert, see **Record Collisions** on page 12.16.



Click **OK**, or press **Enter**. The **Copy Editor** will open:



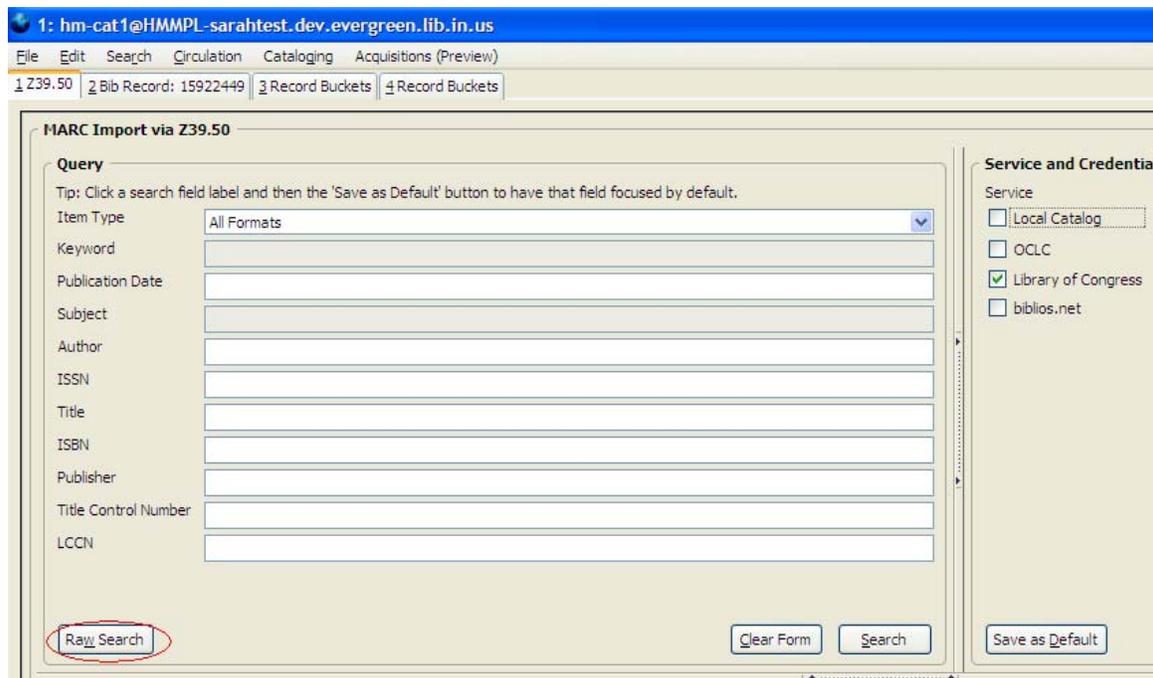
Apply the Item Attributes desired, and click **Create Copies (Alt + M)** See **Chapter –Using the Copy Editor**, if needed.

The imported record will display in your default view, and your item holding will be attached to the record at your branch. You can view the attached item on the Holdings Maintenance Screen, and make any corrections, if needed.

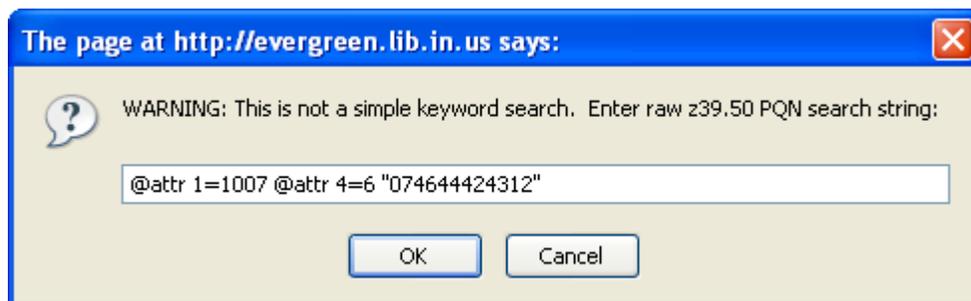
NOTE: If you need to attach multiple copies or a copy at different branch than where you work, see Chapter 5—Adding Holdings. This cannot be done with Fast Item add.

Raw Searches

In addition to using the search fields, you can do a Raw Search (PQN) by clicking on the **Raw Search (Alt + W)** button.



A dialog box will open up:



This allows you to do searches for which there are no search fields, if you are familiar with PQN searching.

Evergreen Indiana Cataloging Training Manual
Chapter 12 – Adding New Records via Z39.50

NOTE: Raw searches are not affected or limited by anything you have input inot the other search query boxes.

To do a UPC search, enter @attr 1=1007 @attr 4=6 "UPC,"
Inserting the actual UPC you wish to search in place of the letters UPC, as shown above. Then click **OK** or Press **Enter**.

NOTE: If Local Catalog is selected as a search target, Raw Search will not active.