April 10, 2019

Virtual Ask QC Office Hours

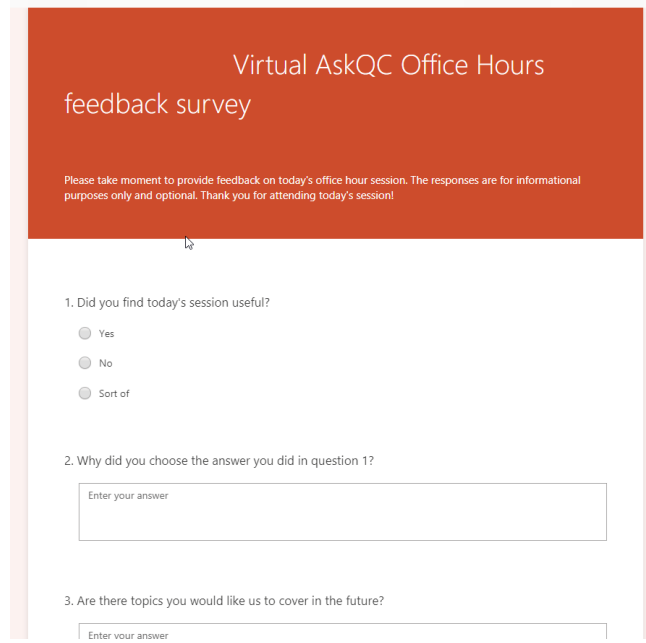
An overview of OCLC training resources

presented by OCLC Member Education

Hello .

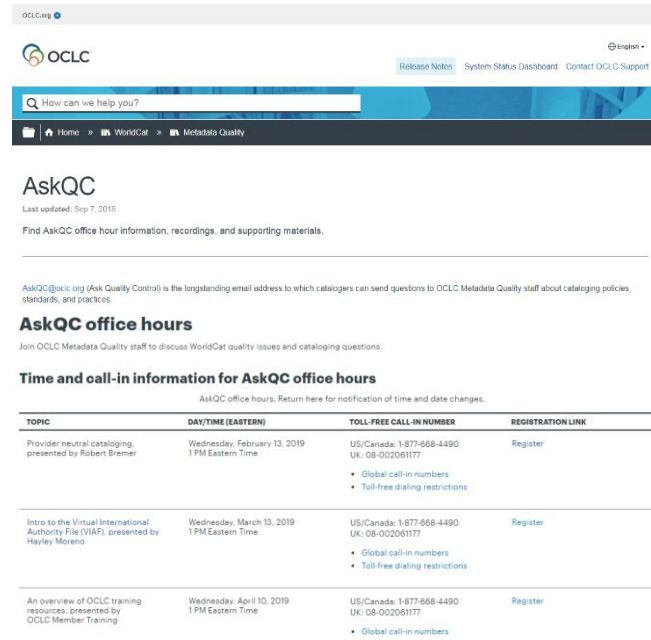
Housekeeping

- After the session you will be directed to a quick, optional survey



Housekeeping

- After the session you will be directed to a quick, optional survey
- All session recordings, slides, and notes are available at oc.lc/askqc



On the call today

Hayley Moreno
Database Specialist II

Rick Newell
Senior Training Coordinator

Shanna Griffith
Database Specialist II

Robert Bremer
Senior Consulting Database Specialist

Bryan Baldus
Consulting Database Specialist

Jay Weitz
Senior Consulting Database Specialist

Member Education staff

Kathy Kie
Senior Training Coordinator

Rick Newell
Senior Training Coordinator

Mindy Tran
Senior Training Coordinator

Mary Alice Robinson
Senior Training Coordinator

OCLC training – purpose and goals

- Our purpose is to help our member libraries achieve effective use of our products and services
- Our goal is to offer training at no cost to OCLC member libraries in a variety of formats to meet our learners where and when they need assistance:
  - Through online and recorded instructor-led training
  - Through point of need tutorials and exercises
  - Through supplemental training resources that can help you build foundational skills.

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OCLC

3/22 - update

Use Supplemental training resources to help you build foundational skills

OCLC training – purpose and goals

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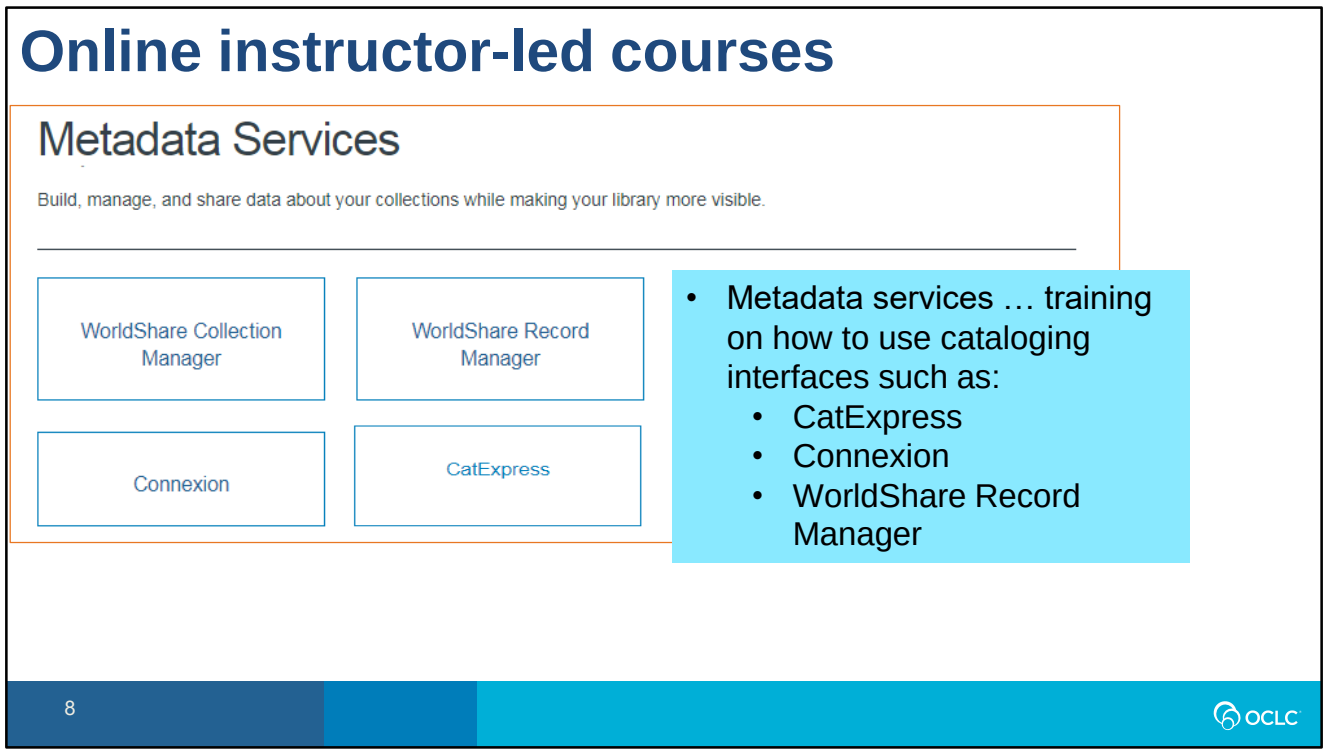
OCLC

3/22 - update

Use Supplemental training resources to help you build foundational skills



Demo how to find training under Metadata

Look at Collection Manager pages… use phrases about OCLC training from the librarians toolbox

3/22 = To find all available training options for a product, visit the Support home page.

Use the **All products and services** list at the bottom of the page to navigate to your product or service area of interest, then look for the **Training** guide within that product.

- Visit the Support home page at https://help.oclc.org
- Use link at page bottom to all products and services
- Or, select the category such as Metadata
- Review the product/service areas under metadata services
- Select Record Manager and navigate to the Training guide (lower left of page)

- Click the … ellipsis at the bottom of the list to expand it and see all the options

Training related to WorldCat quality

OCLC offers several courses designed to help learners gain a working knowledge of the rules and procedures for editing and replacing master records in WorldCat and how to find resources and detailed information about upgrading records and creating original cataloging.

These courses are for staff that have sufficient knowledge of cataloging rules to contribute quality metadata to WorldCat.

product training isn't the only type of learning you need to be effective.

Connexion

- For foundational cataloging information, Connexion client and browser offer modules that review policies and steps for editing and replacing master records and contributing original records to WorldCat.

Connexion client:
- Module 6: Editing master records
- Module 8: Original Cataloging

Connexion browser:
- Module 5: Editing master records
- Module 7: Original Cataloging

Courses are offered at intervals throughout the year.

Links to recordings are available on training pages in each product area.

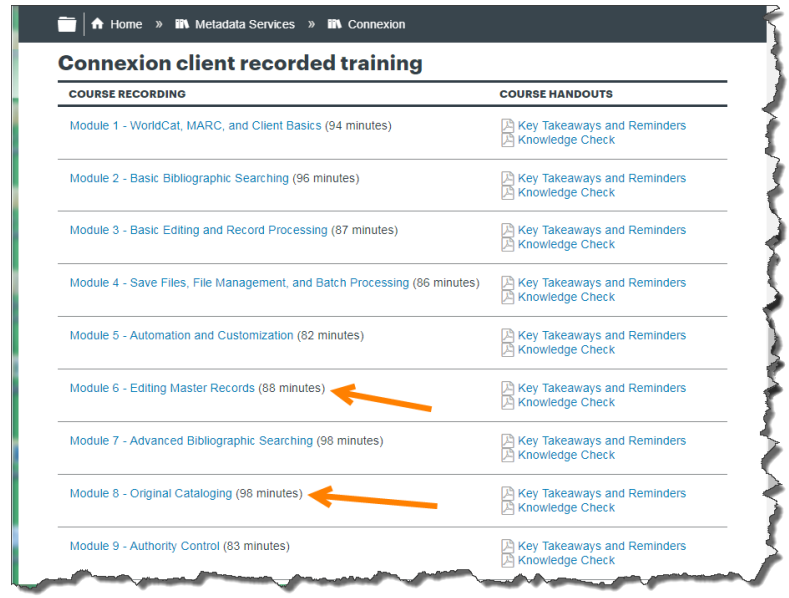
Connexion

Connexion recorded training and links to handouts are under that service.

You will be asked to register to view the recording.

By registering, you can offer feedback about the session.

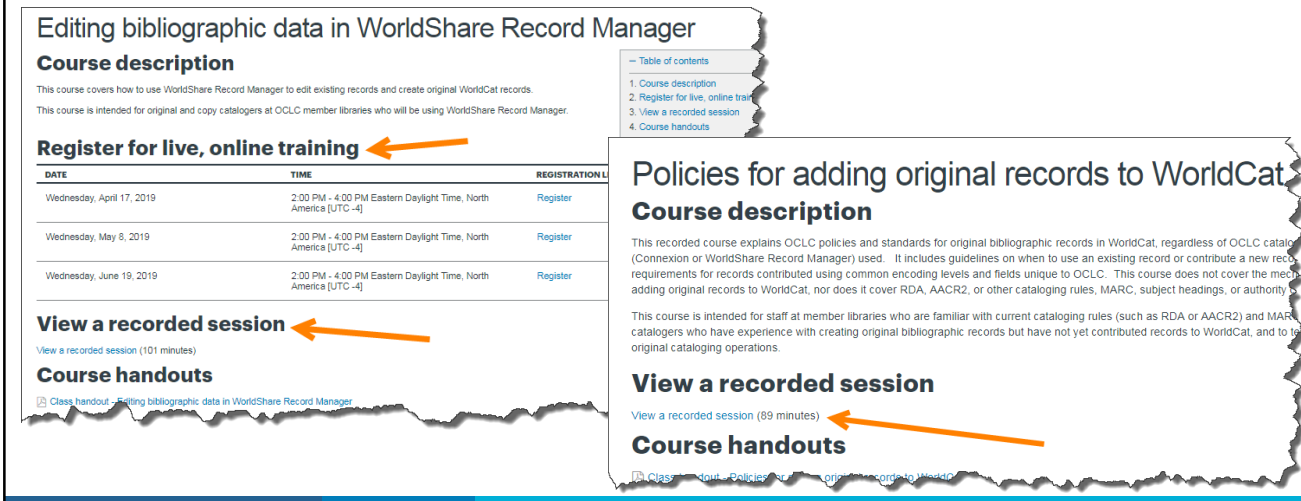
Registration also enables Member Education to track our training reach.



Live training is also available on this page…

WorldShare Record Manager

Course page has schedule for live sessions and link for a recorded session



Same registration applies to these recorded sessions…

Class example: Replacing master records

Recognize the encoding levels in records to determine the type of record replacement that may be applied to records in WorldCat:

1. Minimal-level upgrade
2. Database enrichment
3. Expert Community

Most functions can be done based on the encoding level in the record and the authorization level of the cataloger

Review these records to determine the circumstances for replacing them

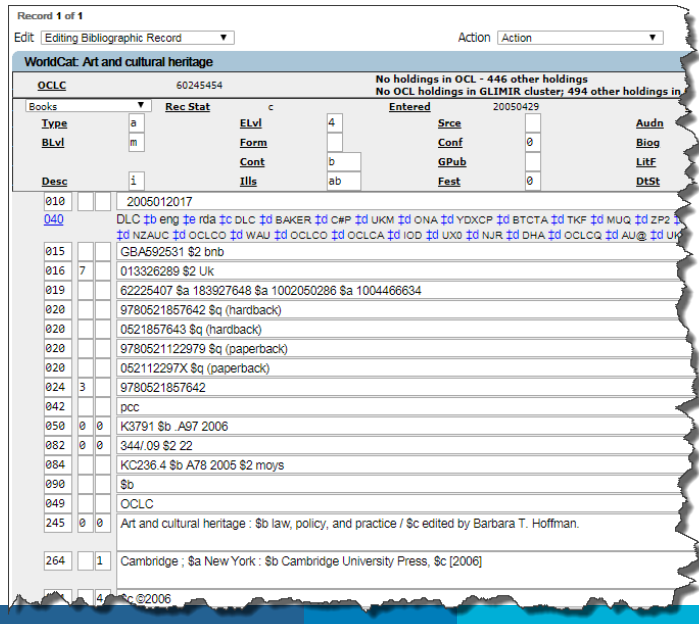
This is an example of what information is reviewed during the enriching master records session:

Minimal-level upgrade definition: Records that meet the requirements of first-level description (AACR2, rule 1.0D1). Correspondence between data in Minimal-level records and data required for first-level description is not exact. Data required for online cataloging may not be required by cataloging rules.

Database enrichment: implemented in 1991, this capability allowing full mode and higher authorizations to add subject headings and call numbers to records. The ability to add 505 contents notes became part of Database Enrichment in August 1992. Also in 1992, it became possible for full and higher authorizations to add 300 physical description fields to CIP records. Allowing Enhance participants to upgrade any CIP record, except for its Encoding Level value of 8, was introduced in 1993. Database Enrichment was further expanded in March 1996 when fields 006 and 007 were added, and yet again in August 2002 with the addition of over two dozen 0xx, 5xx, and 6xx fields.

The Expert Community is an expansion of master record editing capabilities to all full level cataloging users. OCLC's Expert Community provides Connexion users who have a full level authorization or higher more flexibility in making changes to WorldCat master bibliographic records. Maintenance of WorldCat is shared more equally between OCLC staff and member libraries. The additional capabilities provided are a powerful expansion of those that have been available especially through Database Enrichment since 1991.

Recognize Encoding Levels in Records



Record 1 of 1

Edit: Editing Bibliographic Record — Action: Action

WorldCat: Art and cultural heritage

OCLC 60245454 — No holdings in OCL - 446 other holdings
No OCL holdings in GLIMIR cluster; 494 other holdings in

Books		Rec Stat	c		Entered	20050429		
Type	a	ELvl	4		Srce		Audn	
BLvl	m	Form			Conf	0	Biog	
		Cont	b		GPub		LitF	
Desc	i	Ills	ab		Fest	0	DtSt	

010			2005012017
040			DLC ǂb eng ǂe rda ǂc DLC ǂd BAKER ǂd C#P ǂd UKM ǂd ONA ǂd YDXCP ǂd BTCTA ǂd TKF ǂd MUQ ǂd ZP2 ǂ… ǂd NZAUC ǂd OCLCO ǂd WAU ǂd OCLCO ǂd OCLCA ǂd IOD ǂd UX0 ǂd NJR ǂd DHA ǂd OCLCQ ǂd AU@ ǂd UK…
015			GBA592531 $2 bnb
016	7		013326289 $2 Uk
019			62225407 $a 183927648 $a 1002050286 $a 1004466634
020			9780521857642 $q (hardback)
020			0521857643 $q (hardback)
020			9780521122979 $q (paperback)
020			052112297X $q (paperback)
024	3		9780521857642
042			pcc
050	0	0	K3791 $b .A97 2006
082	0	0	344/.09 $2 22
084			KC236.4 $b A78 2005 $2 moys
090			$b
049			OCLC
245	0	0	Art and cultural heritage : $b law, policy, and practice / $c edited by Barbara T. Hoffman.
264		1	Cambridge ; $a New York : $b Cambridge University Press, $c [2006]
…		4	$c ©2006

Can you replace this record through:

1. Minimal-level upgrade?
2. Database enrichment?
3. Expert Community?

OCLC

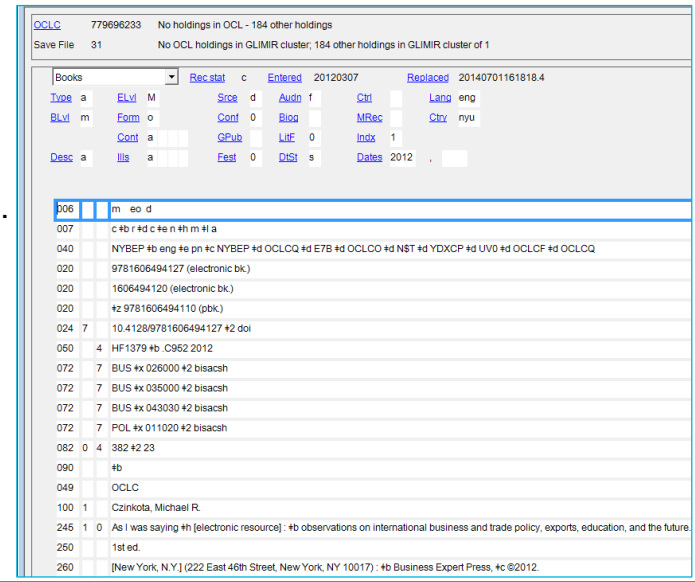
Record example: using Connexion browser… LOCK record before editing

OCLC # 60245454

Minimal Upgrade? No
Database Enrichment? Yes
Expert Community? No
Notes Upgrade/change record with special authorization

Recognize Encoding Levels in Records

Can you replace this record through …
1.Minimal-level upgrade?
2.Database enrichment?
3.Expert Community?



OCLC 779696233 No holdings in OCL - 184 other holdings
Save File 31 No OCL holdings in GLIMIR cluster; 184 other holdings in GLIMIR cluster of 1

Books | Rec stat c | Entered 20120307 | Replaced 20140701161818.4
Type a | ELvl M | Srce d | Audn f | Ctrl | Lang eng
BLvl m | Form o | Conf 0 | Biog | MRec | Ctry nyu
Cont a | GPub | LitF 0 | Indx 1
Desc a | Ills a | Fest 0 | DtSt s | Dates 2012 ,

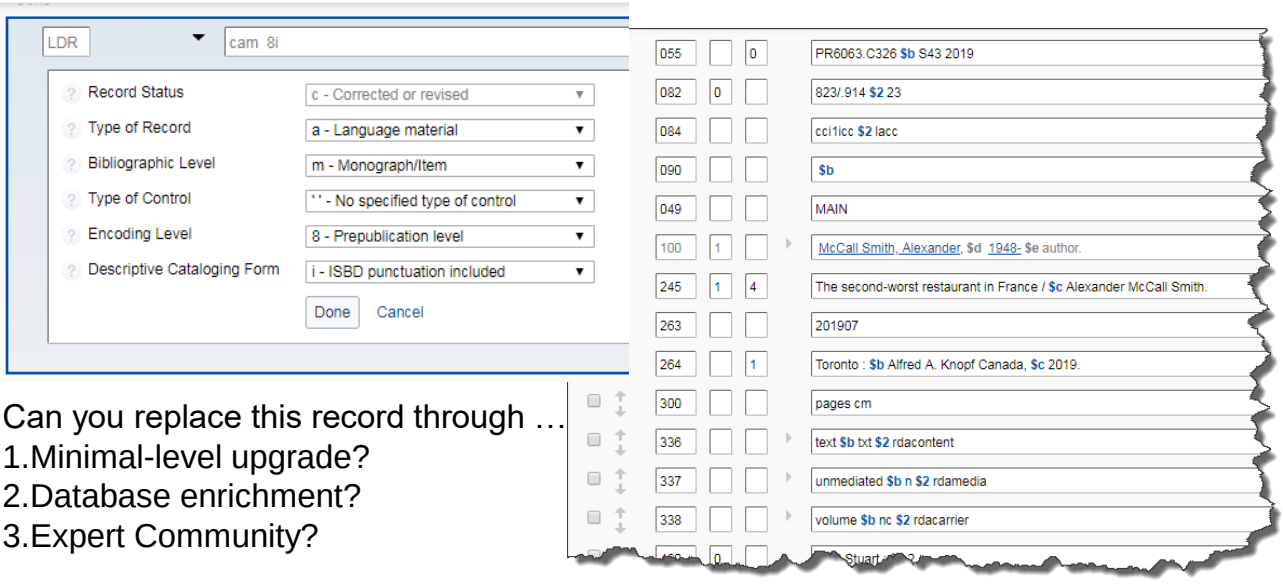
006			m eo d
007			c ǂb r ǂd c ǂe n ǂh m ǂl a
040			NYBEP ǂb eng ǂe pn ǂc NYBEP ǂd OCLCQ ǂd E7B ǂd OCLCO ǂd N$T ǂd YDXCP ǂd UV0 ǂd OCLCF ǂd OCLCQ
020			9781606494127 (electronic bk.)
020			1606494120 (electronic bk.)
020			ǂz 9781606494110 (pbk.)
024	7		10.4128/9781606494127 ǂ2 doi
050		4	HF1379 ǂb .C952 2012
072		7	BUS ǂx 026000 ǂ2 bisacsh
072		7	BUS ǂx 035000 ǂ2 bisacsh
072		7	BUS ǂx 043030 ǂ2 bisacsh
072		7	POL ǂx 011020 ǂ2 bisacsh
082	0	4	382 ǂ2 23
090			ǂb
049			OCLC
100	1		Czinkota, Michael R.
245	1	0	As I was saying ǂh [electronic resource] : ǂb observations on international business and trade policy, exports, education, and the future.
250			1st ed.
260			[New York, N.Y.] (222 East 46th Street, New York, NY 10017) : ǂb Business Expert Press, ǂc ©2012.

using Connexion client or Record Manager, it is not necessary to LOCK record before editing

OCLC #779696233

Minimal Upgrade? Yes
Database Enrichment? Yes
Expert Community? Yes
Notes Less than full Elvl; no field 042

Recognizing Encoding Levels in Records



Can you replace this record through …
1. Minimal-level upgrade?
2. Database enrichment?
3. Expert Community?

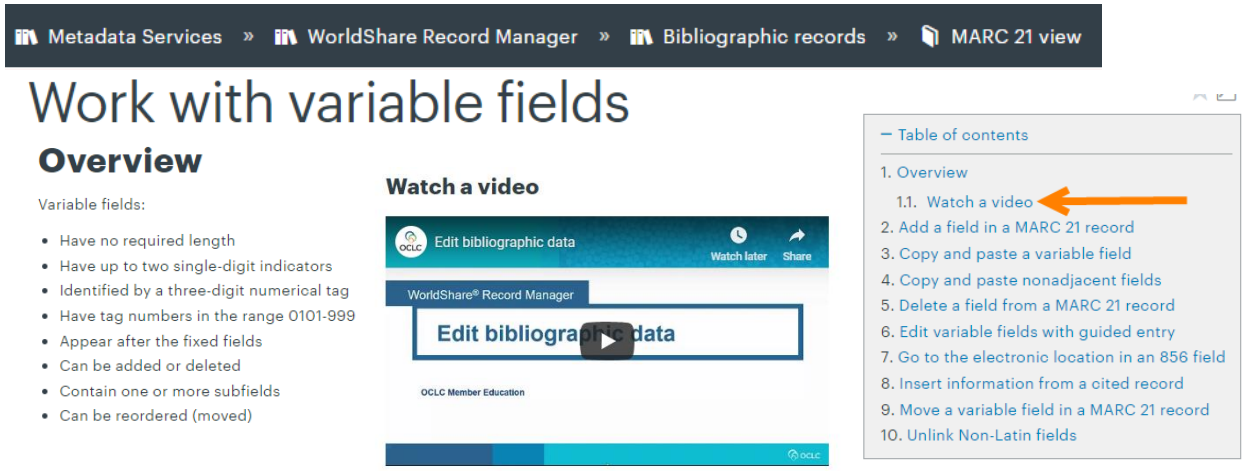
This is a record display from Record Manager

OCLC #1090797793

Minimal Upgrade? No
Database Enrichment? Yes
Expert Community? Yes
Notes CIP upgrade; leave Elvl as is after updating

Point of need tutorials

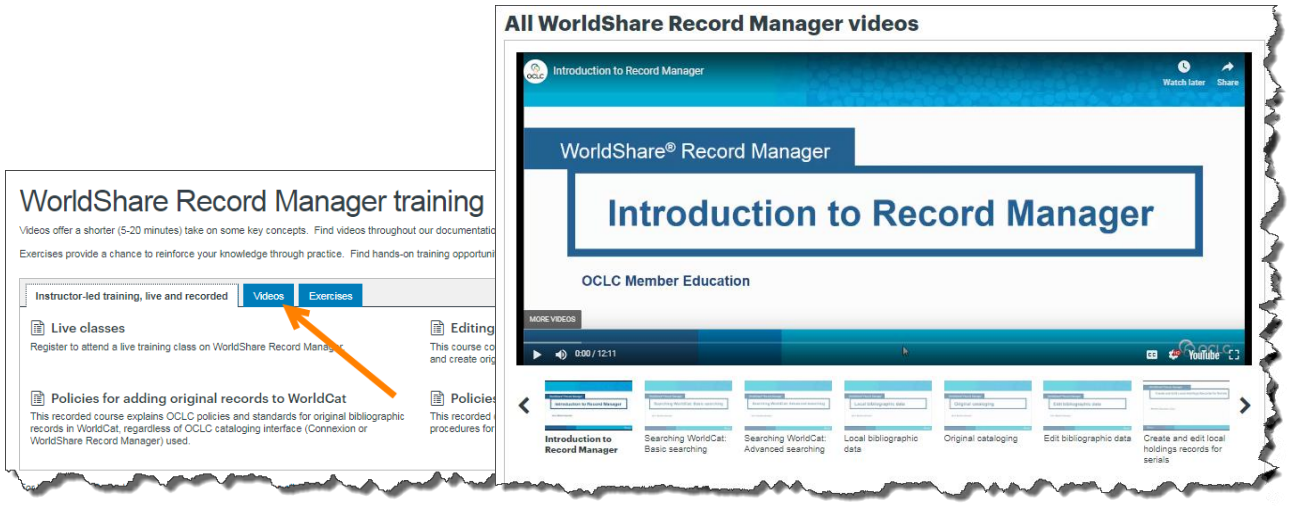
- Videos are embedded in cataloging documentation to illustrate a concept or provide a brief step-by-step guide to performing a task



Videos offer a shorter (5-20 minutes) take on some key concepts. Find videos throughout our documentation or on the Videos page in this guide.

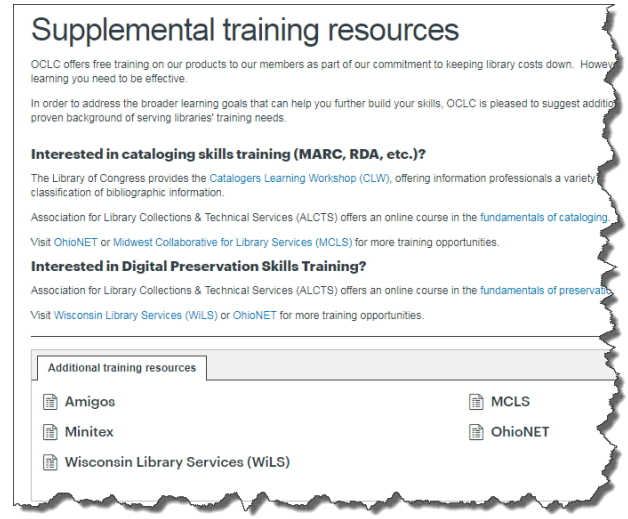
Playlists in each training guide

- Videos are found on the Videos page in the product training guide.



Supplemental training resources

In order to address broader learning goals to help you build your skills, OCLC is pleased to suggest additional training resources from select organizations with a proven background of serving libraries' training needs.



https://help.oclc.org/Librarian_Toolbox/Supplemental_training_resources

Library of Congress

- Provides training resources for information professionals related to the organization and classification of bibliographic information.

- Library of Congress Subject Headings
- RDA: Resource Description & Access
- BIBFRAME Pilot at Library of Congress

https://www.loc.gov/catworkshop/

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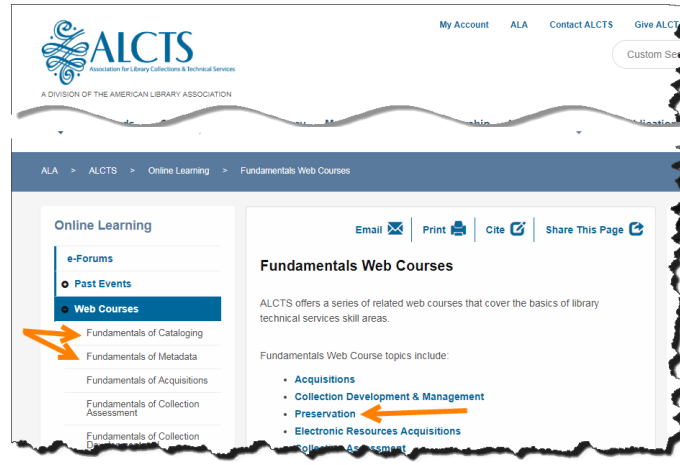
product training isn't the only type of learning you need to be effective.

ALCTS
Association for Library Collections & Technical Services

- Offers training in the basics for library technical services skill areas

- Fundamentals of Cataloging
- Fundamentals of Metadata
- Fundamentals of Preservation



http://www.ala.org/alcts/confevents/upcoming/webcourse

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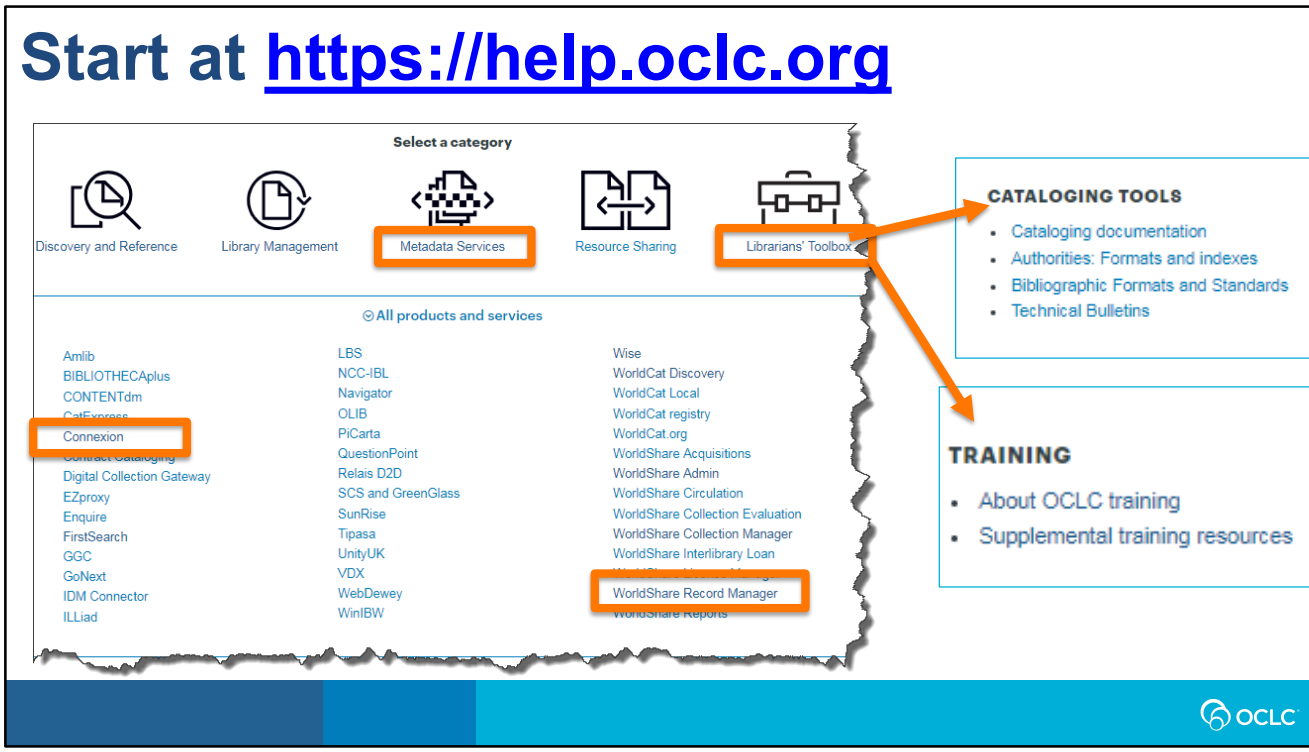
product training isn't the only type of learning you need to be effective.

REVIEW

Start at https://help.oclc.org



How to locate training
select a category to navigate to the specific product and that training page

Or select your product directly from the list of all product and services

Visit the librarians toolbox to view cataloging documentation such as Bib formats and standards as well as general info about OCLC training and the supplemental training resources that are available (and that we discussed today)

Questions?

Kathy Kie
Senior Training Coordinator

Rick Newell
Senior Training Coordinator

Mindy Tran
Senior Training Coordinator

Mary Alice Robinson
Senior Training Coordinator

Questions?

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Thank you!

Send cataloging policy questions at anytime to:
askqc@oclc.org

Session links available at:
oc.lc/askqc

Next Virtual AskQC Office Hours:

Small errors with big consequences

Wednesday, May 8, 2019
1:00 PM Eastern

Register at oc.lc/askqc

OCLC