Connexion Client Module 06: Editing, Upgrading & Enriching WorldCat Records

Introduction

OCLC offers libraries with full cataloging authorizations the ability to edit and replace records in WorldCat. These processes along with other quality control actions can improve the WorldCat database for all libraries. The course reviews the best practices for identifying and editing records to correct errors, enriching records by adding data or upgrading a record to a higher encoding level to improve discovery and usability.

At the end of this session, the learner will be able to identify what information can be added to a record or what errors can be corrected, and how to replace the record so the changed record is available in WorldCat. The learner will also be able to identify the process to report errors in records when the change cannot be made by the learner.

Menu Commands in Connexion Client

On the Menu Bar

File   Cataloging   Authorities   Edit   Action   Batch   View   Tools   Window   Help

Menu Commands in Connexion Client

- **Edit WorldCat Records**
  - Lock the record
    - Action > Lock WorldCat Record
  - Edit the record
  - Replace the record
    - Action > Replace Record
    - Or...

- **Release a record lock**
  - Release Lock
    - Action > Release Record Lock

- **Report an error to OCLC Metadata Quality**
  - Report Error
    - Action > Report Error
Guidelines to edit and replace WorldCat records

Library staff with full level cataloging authorizations, can edit most fields in most WorldCat records. This includes the ability to replace non-BIBCO records and non-CONSER records. Program for Cooperative Cataloging (PCC) BIBCO records in WorldCat can be enriched by Non-PCC Catalogers with replace capabilities by adding or editing the fields in the table at this link from Bibliographic Formats and Standards, Chapter 5, Section 5.2.3, Editing capabilities for PCC records: [https://www.oclc.org/bibformats/en/quality.html#databaseenrichment](https://www.oclc.org/bibformats/en/quality.html#databaseenrichment)

Non-PCC Catalogers with replace capabilities cannot enrich Program for Cooperative Cataloging (PCC) CONSER records in WorldCat.

- PCC records—both BIBCO and CONSER records—are identified by one or more of the following field 042 authentication codes:
  - isds/c, lc, lcdn, msc, nlc, nsdp, nst, pcc.

- Field exceptions: you cannot edit these fields in WorldCat records:
  - System-supplied data (040 subfield ‡c, Entered)
  - Fields 019, 029, 066, 850, and 938
  - Field 042

Guidelines for the Expert Community

The Expert Community provides Connexion users with a full level authorization or higher more flexibility in making changes to WorldCat bibliographic records. This enables the maintenance of WorldCat to be shared more equally between OCLC staff and member libraries.

Consider these guidelines when determining what changes may be made to a record:

- First, do no harm
  - NEVER remove correct and accurate information from a WorldCat record (such as classification numbers or subject headings) because the information does not apply to your institution
  - NEVER change the basic nature of a WorldCat record into something different
  - AVOID including local data or local practices in a WorldCat bibliographic record
  - Be cautious about changing bibliographic records with a different Language of Cataloging (identified in field 040 subfield ‡b)

- If in doubt, DON’T
  - Do not replace a record solely to change an element that is cataloger’s judgment
  - Consider data within the context of the whole record, rather than in isolation

- For more information about the Expert Community including detailed guidelines, visit the page at this link: [https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community](https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community)
**Upgrade records:**

With full-level or higher cataloging authorizations or roles, you can upgrade records to become full-level records, or you may upgrade abbreviated and partial level records to minimal-level or full-level records. Prefer use of MARC encoding level codes, the details can be found at this link: [https://www.oclc.org/bibformats/en/fixedfield/elvl.html](https://www.oclc.org/bibformats/en/fixedfield/elvl.html)

Exceptions for editing encoding level with MARC encoding level codes include BIBCO records (i.e., with field 042 pcc) and CONSER records (i.e., with a CONSER code in field 042).

<table>
<thead>
<tr>
<th>Encoding Level</th>
<th>Definition</th>
<th>Action</th>
<th>Edit Encoding Level to</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Full level input by OCLC participants</td>
<td>Edit as needed</td>
<td>blank</td>
</tr>
<tr>
<td>J</td>
<td>Deleted record</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>K</td>
<td>Minimal level input by OCLC participants</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>M</td>
<td>Added from a batch process</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>blank</td>
<td>Full level</td>
<td>Edit as needed</td>
<td>blank</td>
</tr>
<tr>
<td>1</td>
<td>Full level, material not examined</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>2</td>
<td>Less-than-full level, material not examined</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>3</td>
<td>Abbreviated level</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>4</td>
<td>Core level</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>5</td>
<td>Partial (preliminary) level</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>7</td>
<td>Minimal level</td>
<td>Upgrade to full level</td>
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**Encoding level 8.** Prepublication monograph level records, including Cataloging-in-Publication (CIP) program records. With a full-level authorization (Connexion), you may add or edit any field in these records, but you cannot change the encoding level value itself.

Exceptions include these fields, which should not be edited: 010, 040, national call number fields (except to modify date of publication (if needed), or field 263 in CIP records.
**Report errors**

If you are unable to replace a WorldCat record, you can report the record to OCLC for correction.

The types of errors that can be reported, include:
- Duplicate records and incorrect merges
- Type and BLvl code changes
- Non-filing indicator changes
- Correction of name access points
- Inappropriate subject access points
- Other changes, corrections, and additions to bibliographic records that the system will not allow you to change

- Report the error via:
  - Connexion: Action > Report Error
  - Email: bibchange@oclc.org
  - Web: https://www.oclc.org/forms/record-quality.en.html

Some requests require proof from the piece to make the change. View all the guidelines for what errors need proof and what do not need proof at this link: https://www.oclc.org/bibformats/en/quality.html#requestingchangestorecords

**Resources**

**Bibliographic formats and standards**
https://www.oclc.org/bibformats/en.html

**Replace bibliographic records interactively:**
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3_0/Cataloging/Take_actions_on_bibliographic_records/Replace_WorldCat_bibliographic_record_interactively_or_by_batch/10Replace_bibliographic_records_interactively

**Report errors on bibliographic records:**
https://help.oclc.org/Metadata_Services/Connexion/Connexion_client_3_0/Cataloging/Edit_bibliographic_records/Report_errors_in_bibliographic_records

**Ask QC office hours**
https://help.oclc.org/WorldCat/Metadata_Quality/AskQC?sl=en
Test your knowledge

1. You can edit WorldCat records with a full-level cataloging authorization.
   a. True
   b. False

2. Which of the following is not a reason to improve WorldCat records?
   a. Contribute to the library cooperative
   b. Improved sales for “library friends” bookstores
   c. Improved discovery experience for users

3. Match the definition with the process:

<table>
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<td>Edit</td>
<td>a. upgrade a bibliographic record to a higher encoding level</td>
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<tr>
<td>Enrich</td>
<td>b. correct errors in the record so it conforms to cataloging guidelines</td>
</tr>
<tr>
<td>Enhance</td>
<td>c. add data to a full-level record</td>
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4. Where can you locate a record’s encoding level?
   a. Fixed field: Desc
   b. Field 040
   c. Fixed field: Type
   d. Fixed field: ELvl
   e. Field 049

5. If you find a record with encoding level 8, what changes can you make to the record?
   a. Change the encoding level to value |BLANK|
   b. Add the physical description for the item to field 300
   c. Add summary in field 520
   d. Remove field 263

6. Which values in the ELvl fixed field indicate a full-level record?
   a. Value: I or BLANK
   b. Value: K or 7
   c. Value: M
   d. Value: 8
7. What is the process to replace a WorldCat record?
   a. Edit the record, lock, and replace the record
   b. Submit record changes to OCLC Metadata Quality
   c. Lock the record, edit the record, replace the record.
   d. Derive a new record from the existing record that has errors

8. With a full-cataloging authorization, what can you do in the situations described below?
   a. You find a record coded level 7 that does not contain fields 050, 505 and 650.
      i. Can you update this record?
      ii. Can you change the encoding level?
      iii. If yes, what is the new value for the encoding level?
   b. You find a record coded level 3, with an incomplete title and other missing fields.
      i. Can you modify this record?
      ii. Can you change the encoding level?
      iii. If yes, what is the new value for the encoding level?
   c. You find a record coded level |BLANK|, with typographical errors in fields such as 505, 520 and 650.
      i. Can you modify this record?
      ii. Can you change the encoding level?
      iii. If yes, what is the new value for the encoding level?
   d. You find a record coded level |BLANK|, with an error in field 246. This record also has field 042 coded: pcc.
      i. Can you modify this record?
      ii. Can you change the encoding level?
      iii. If yes, what is the new value for the encoding level?

9. View the following records in WorldCat, and decide whether you can replace the record through: A. Edit; B. Enrich; C. Enhance; D. None (record cannot be replaced)
   a. OCN: #1291217957 (Robb, J. D. Forgotten in death)
   b. OCN: #1287080589 (Wright, Cameron. A Screw Loose)
   c. OCN: #1291206612 (Will, Amy. Launching & building a brand)
   d. OCN: #1287746534 (Rowles, Daniel. Digital branding)
   e. OCN: #1268121299 (Communicative constructions and the refiguration of spaces)
   f. OCN: #1246307965 (Martin, Kent. Peggy’s Cove)

Check your answers on the next pages
Answers (correct answers are in **BOLD**).

1. You can edit WorldCat records with a full-level cataloging authorization.
   a. **True**
   b. False

2. Which of the following is **not** a reason to improve WorldCat records?
   a. Contribute to the library cooperative
   b. **Improved sales for “library friends” bookstores**
   c. Improved discovery experience for users

3. Match the definition with the process:

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4. Where can you locate a record’s encoding level?
   a. Fixed field: Desc
   b. Field 040
   c. Fixed field: Type
   d. **Fixed field: ELvl**
   e. Field 049

5. If you find a record with encoding level 8, what changes can you make to the record?
   a. Change the encoding level to value [BLANK]
   b. **Add the physical description for the item to field 300**
   c. Add summary in field 520
   d. Remove field 263

6. Which values in the ELvl fixed field indicate a full-level record?
   a. **Value: I or BLANK**
   b. Value: K or 7
   c. Value: M
   d. Value: 8

7. What is the process to replace a WorldCat record through Connexion client?
   a. Edit the record, lock, and replace the record
   b. Submit record changes to OCLC Metadata Quality
   c. **Lock the record, edit the record, replace the record.**
   d. Derive a new record from the existing record that has errors
8. With a full-cataloging authorization, what can you do in the situations described below?

a. You find a record coded level 7 that does not contain fields 050, 505 and 650.
   i. Can you update this record? **YES**
   ii. Can you change the encoding level? **YES**
   iii. If yes, what is the new value for the encoding level? **BLANK**

b. You find a record coded level 3, with an incomplete title and other missing fields.
   i. Can you modify this record? **YES**
   ii. Can you change the encoding level? **YES**
   iii. If yes, what is the new value for the encoding level? **ELvl 7 or BLANK**

c. You find a record coded level **BLANK**, with typographical errors in fields such as 505, 520 and 650. The record does not contain field 042.
   i. Can you modify this record? **YES**
   ii. Can you change the encoding level? **NO**
   iii. If yes, what is the new value for the encoding level?

d. You find a record coded level **BLANK**, with an error in field 246. This record also has field 042 coded: pcc.
   i. Can you modify this record? **YES**
   ii. Can you change the encoding level? **NO**
   iii. If yes, what is the new value for the encoding level?

9. View the following records in WorldCat, and decide whether you can replace the record through: A. Edit; B. Enrich; C. Enhance; D. None (record cannot be replaced)

**Note:** Records viewed on February 4, 2022; answers may change due to dynamic nature of WorldCat database

- a. OCN: #1291217957 (Enrich, Enhance, update ELvl to **BLANK**)
- b. OCN: #1287080589 (Enrich, Enhance, update ELvl to **BLANK**)
- c. OCN: #1291206612 (Edit, Enrich, ELvl is already I; change to **BLANK** is optional)
- d. OCN: #1287746534 (No to all options; ELvl is **BLANK** with 042 pcc)
- e. OCN: #1268121299 (Edit, Enrich, Enhance; retain ELvl value 8)
- f. OCN: #1246307965 (Edit, Enrich, Enhance; update ELvl to 7 or **BLANK**)
Keystroke shortcuts in Connexion Client

Selected Default Keystroke Shortcuts in Connexion Client

Navigate within a record

• Move between OCLC number, fixed, & variable fields <F6>
• Move to next cell Press <Tab>
• Move to previous cell <Shift><Tab>
• Move to next subfield in variable fields <Ctrl><S>

Edit text

• Delete entire field <Alt><Del>
• Copy entire current field <Alt><Insert>
• Undo edits in current cell <Ctrl><Z>
• Cancel all edits in entire record (Caution!) <Ctrl><Shift><Z>
• Delete from cursor to end of cell <Ctrl><F7>
• Delete current word <Alt><F7>
• Spell Check <F7>

• Cut selected text <Ctrl><X>
• Copy selected text <Ctrl><C>
• Paste selected text <Ctrl><V>

• Insert field below current field <Enter>