Connexion® client 3: Record editing and processing

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Member Education
Learning objectives

- Editing / adding / deleting fields
- MARC Field Help
- Update and delete WorldCat holdings
- Export records
- Replace WorldCat records
- Create new WorldCat records
Our item

READER, COME HOME
The Reading Brain in a Digital World
MARYANNE WOLF
Illustrated by Catherine Stoddy

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Test your knowledge 1

Which is **not** a function of Validate?

A. Checks validity of tags, indicators, subfield codes
B. Checks the validity of subject headings
C. Verifies all required fields are present
D. Verifies that non-repeatable fields occur only once
E. Checks relationships between some elements
Test your knowledge 2

You had two copies of a title but have withdrawn one copy from your library since it has been declared lost. What should you do about the record in *WorldCat*?

A. Delete the WorldCat record
B. Delete your holdings from the WorldCat record
C. Nothing
Replace

- Save changes to the WorldCat record
- Field 040 $d <your OCLC symbol> added
- **Full Cataloging** authorization in Connexion client needed
When to Replace a record

• When you edit a WorldCat record
  – **Corrections** (e.g., fixing typos, incorrect coding, etc.)
  – **Enrichments** (e.g., add subject headings, add formatted contents notes, etc.)
  – **Upgrade** encoding level
  – **Control headings**

• And the changes are not just for local use, but appropriate for the WorldCat record
Guidelines for Replace

For the complete guidelines for replacing WorldCat records, see *Bibliographic Formats and Standards, Chapter 5*

Procedures for Replace

- Save or Lock the record (optional)
- Edit the record
- Replace the record
Reporting errors you can’t fix yourself

• Report error via:
  – Connexion
    • (online) Action > Report Error
    • Help > Useful Web Links > Record Change Request
  – Email to bibchange@oclc.org

• Proof may be required for some changes
  See Bibliographic Formats and Standards section 5.5
Create a new WorldCat record

• Do a thorough search in WorldCat to avoid adding a duplicate record

• If you find a record for a similar item, you may choose to derive a new record
Guidelines for new WorldCat records

1. Determine whether to input a new record
   Refer to *Bibliographic Formats and Standards*, Chapter 4—When to input a new record

2. If no matching record exists in WorldCat, create a new record according to current cataloging practices, e.g., *Resource Description & Access* (RDA)
   Refer to *Bibliographic Formats and Standards*, Chapter 2—Online cataloging
Methods of creating a new record

If a new record is needed, you can:

• Create a new record from a blank workform
• Derive a new record from an existing WorldCat record
Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Crystal Rodriguez
- Category: Cataloging and Metadata
- Class name: Connexion client 3 – Record editing and processing

Training questions? Contact OCLC Training training@oclc.org/