

Key Takeaways and Reminders



Editing, Upgrading and Enriching Master Records

Editing Master Records

- **Lock the Record**
 - **Action**>Lock Master Record

Make the appropriate edits then...

- **Replace the Record**
 - **Action**>Replace Record

Release a Record Without Making Changes

- **Release Lock**
 - **Action**>Report Error

Report an Error to OCLC Quality Control

- **Report Error**
 - **Action**>Release Record Lock

Brief Guidelines for Replacing Master Records

- If you have a full level cataloging authorization or higher, as part of the Expert Community, you can edit most fields in most master records.
 - Record exceptions:
 - PCC records—both BIBCO and CONSER records—are EXCLUDED. These records are identified by one or more of the following field 042 authentication codes: isds/c, lc, lcd, msc, nlc, nsdp, nst, pcc. HOWEVER, non-PCC libraries can add or edit specific fields as listed in Database Enrichment <https://www.oclc.org/bibformats/en/quality.html#databaseenrichment>
 - Institution Records (IRs) are EXCLUDED
 - Records in the Hand Press Books database are EXCLUDED
 - Records with Encoding Level "E" are EXCLUDED
 - Field exceptions: you cannot edit these fields in master records:
 - System-supplied data (040 subfield ≠c, Entered)
 - Fields 019, 029, 066, 850, and 938
 - Field 042
 - Principles

- First, do no harm
 - NEVER remove correct and accurate information from a master record (such as classification numbers or subject headings) simply because your institution does not find it useful
 - NEVER change the basic nature of a master bibliographic record into something different
 - AVOID including local data or local practices in a master 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 a matter of cataloger's judgment
 - Consider data within the context of the whole record, rather than in isolation

For complete Expert Community Guidelines, see <https://www.oclc.org/support/services/worldcat/documentation/cataloging/guidelines.en.html>

- You can also edit and replace master bibliographic records in these situations:

- Upgrade minimal-level records

Existing encoding level	Upgrade to encoding level
K (less-than-full input by OCLC participants)	I
M (less-than-full added from batch)	I
2 (less-than-full, material not examined)	K or I
3 (abbreviated level)	K or I
4 (Core level) (without field 042)	I
5 (Partial (preliminary) level)	K or I (except CONSER-authenticated serials)
7 (Minimal level)	K or I (except CONSER-authenticated serials)

- Database enrichment. You can enrich master records by adding or editing specific fields in any Full-level record, except an authenticated serial. The fields are listed at <https://www.oclc.org/bibformats/en/quality.html#databaseenrichment>

- For complete details, see *Bibliographic Formats and Standards*, chapter 5, Quality Assurance, at <https://www.oclc.org/bibformats/en/quality.html>

Reporting errors you can't fix yourself (including reporting duplicate records)

- Report the error via:
 - Connexion: Action>Report Error
 - Email: bibchange@oclc.org
 - Web: <https://www.oclc.org/forms/record-quality.en.html>
- Proof may be required for some changes
 - See BibFormats section 5.7 for details