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

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• 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
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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.

3/22 - update

Use Supplemental training resources to help you build foundational skills
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3/22 - update

Use Supplemental training resources to help you build foundational skills
Online instructor-led courses

Metadata Services

Build, manage, and share data about your collections while making your library more visible.

- Metadata services … training on how to use cataloging interfaces such as:
  - CatExpress
  - Connexion
  - WorldShare Record Manager

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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](https://help.oclc.org).

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](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.
These courses are designed to be interface neutral so regardless of your cataloging service, the information presented is applicable.

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

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<tr>
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<th>Time</th>
<th>Registration</th>
</tr>
</thead>
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<td>2:00 PM - 4:00 PM Eastern Daylight Time, North America (EDT)</td>
<td>Register</td>
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<td>Wednesday, May 6, 2020</td>
<td>2:00 PM - 4:00 PM Eastern Daylight Time, North America (EDT)</td>
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<td>2:00 PM - 4:00 PM Eastern Daylight Time, North America (EDT)</td>
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*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

Can you replace this record through:

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

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?

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

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<th>Record Status</th>
<th>Language Material</th>
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<th>ISBD Punctuation</th>
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<td>Descriptive Cataloging Form</td>
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</tr>
</tbody>
</table>

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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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

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

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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