Editing, Upgrading & Enriching Master Records

Key Takeaways & Reminders

Menu Commands in Connexion Client

<table>
<thead>
<tr>
<th>On the Menu Bar</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
</tr>
</tbody>
</table>

Menu Commands in Connexion Browser

<table>
<thead>
<tr>
<th>Editing Master Records</th>
<th>Release a Record without Making Changes</th>
</tr>
</thead>
</table>
| • (Optional) Lock the Record  
  ○ Action>Lock Master Record  
  Make the appropriate edits then… | • Release Lock  
  ○ Action>Release Record Lock |
| • Replace the Record  
  ○ Action>Replace Record  
  Or…  
  ○ Action>Replace and Update Holdings | |
| Report an Error to OCLC Quality Control | • Report Error  
  ○ Action>Report Error |

Brief Guidelines for Editing Master Records

• With a full level cataloging authorization or higher, as part of the Expert Community, you can edit most fields in most master records.

• Record exceptions:
  o PCC records—both BIBCO and CONSER records—are EXCLUDED. These records are identified by one or more of the following field 042 authentication codes:
  o isds/c, lc, lcd, msc, nlc, nsdp, nst, pcc.  
  HOWEVER, non-PCC libraries can add or edit specific fields as listed in Database Enrichment. Refer to the information at the link below for details: (http://www.oclc.org/bibformats/en/quality.html#databaseenrichment)
  o Institution Records (IRs) are EXCLUDED
  o Records in the Hand Press Books database are EXCLUDED
  o Records with Encoding Level "E" are EXCLUDED

• Field exceptions: you cannot edit these fields in master records:
  o System-supplied data (040 subfield ‡c, Entered)
  o Fields 019, 029, 066, 850, and 938  
  o Field 042
Principles of the Expert Community

- First, do no harm
  - NEVER remove correct and accurate information from a master record (such as classification numbers or subject headings) because the information does not apply to your institution
  - 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 details at the link below:
  http://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

- 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 the link below:
  http://www.oclc.org/bibformats/en/quality.html#databaseenrichment
- For complete details, see Bibliographic Formats and Standards, chapter 5, Quality Assurance, at this link: http://www.oclc.org/bibformats/en/quality.html

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

Reporting errors (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

- Reporting Bibliographic and Authority Record Changes or Duplicates Instructions
Documentation

- Bibliographic Formats and Standards

- Connexion Client Cataloging Quick Reference:
  [https://oc.lc/connexion-client-quick-ref](https://oc.lc/connexion-client-quick-ref)

- Connexion Client: Edit Bibliographic Records:

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**Selected Default Keystroke Shortcuts in Connexion Client**

**Navigating within a record**

- Move between OCLC number, fixed, & variable fields \(<F6>\)
- Move to next cell \(<\text{Tab}>\)
- Move to previous cell \(<\text{Shift}><\text{Tab}>\)
- Move to next subfield in variable fields \(<\text{Ctrl}><S>\)

**Editing Text**

- Delete entire field \(<\text{Alt}><\text{Del}>\)
- Copy entire current field \(<\text{Alt}><\text{Insert}>\)
- Undo edits in current cell \(<\text{Ctrl}><Z>\)
- Cancel all edits in entire record \((\text{Caution}!)\) \(<\text{Ctrl}><\text{Shift}><Z>\)
- Delete from cursor to end of cell \(<\text{Ctrl}><F7>\)
- Delete current word \(<\text{Alt}><F7>\)
- Spell Check \(<F7>\)
- Cut selected text \(<\text{Ctrl}><X>\)
- Copy selected text \(<\text{Ctrl}><C>\)
- Paste selected text \(<\text{Ctrl}><V>\)