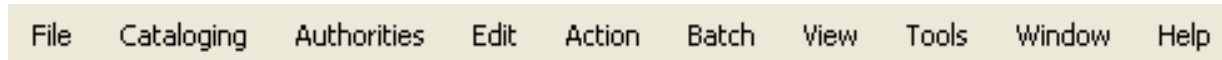


# Editing, Upgrading & Enriching Master Records

## Key Takeaways & Reminders

### Menu Commands in Connexion Client

#### On the Menu Bar



### Menu Commands in Connexion Browser

**Editing Master Records**

- **(Optional) Lock the Record**
  - **Action>Lock Master Record**  
Make the appropriate edits then...
- **Replace the Record**
  - **Action>Replace Record**  
*Or...*
  - **Action>Replace and Update Holdings**

**Release a Record without Making Changes**

- **Release Lock**
  - **Action>Release Record Lock**

**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:
  - 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. Refer to the information at the link below for details:  
(<http://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 Ꞥc, Entered)
  - Fields 019, 029, 066, 850, and 938
  - 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>

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)

## Reporting errors (including reporting duplicate records)

- Report the error via:
  - Connexion: Action>Report Error
  - Email: [bibchange@oclc.org](mailto:bibchange@oclc.org)
  - Web: <https://www.oclc.org/forms/record-quality.en.html>
- Reporting Bibliographic and Authority Record Changes or Duplicates Instructions  
<http://www.oclc.org/support/services/worldcat/documentation/records/instruction-and-guidelines.en.html>

## Documentation

- **Bibliographic Formats and Standards**  
<http://www.oclc.org/bibformats/en.html>
- **Connexion Client Cataloging Quick Reference:**  
<https://oc.lc/connexion-client-quick-ref>
- **Connexion Client: Edit Bibliographic Records:**  
<https://oc.lc/connexion-client-edit-bib-records>



### Selected Default Keystroke Shortcuts in Connexion Client

#### Navigating 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>

#### Editing 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>