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# Connexion® client 3: Record editing and processing

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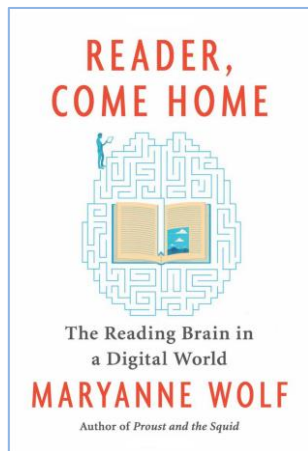
Member Education



# 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 Stoodley



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FIRST EDITION

*Designed by Fritz Metsch*

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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You had two copies of a title but have withdrawn one copy from your library since it has been declared lost.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**

<https://www.oclc.org/bibformats/en/quality.html>



# 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](mailto:bibchange@oclc.org)
  - Web: <https://www.oclc.org/oclc-forms/en/worldcat-bibliographic-authority-record-change.html>
- 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

Questions?

<https://help.oclc.org>

OCLC

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# 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/](mailto:training@oclc.org)