

OCLC Training Opportunities

Prepared for the Illinois State Library

Focus areas: Cataloging · WorldShare Interlibrary Loan · FirstSearch · WorldCat Discovery

The following resources highlight OCLC's instructor-led and self-paced training, along with the upcoming OCLC Cataloging Community Meeting. Session dates and registration links may change; please use the product training page links to confirm the latest offerings.

Live (Instructor-Led) Training

OCLC offers free, live instructor-led courses for many products. Below are the currently scheduled sessions for Cataloging (Connexion client, WorldShare Record Manager, and WorldShare Collection Manager), and WorldShare Interlibrary Loan. Self-paced sessions for FirstSearch or WorldCat Discovery are available.

Cataloging — Connexion Client

Instructor-led courses covering copy cataloging, bibliographic searching, record editing, batch processing, automation, and authority control in Connexion client.

Course	Date & Time (Eastern)	Register
Connexion Client 1: Foundations of Connexion Client Foundational knowledge of Connexion client software and the copy cataloging workflow, including navigation and session setup.	Tue, Oct 6, 2026 – 2:00–3:00 PM	Register
Connexion Client 2: Bibliographic Searching Search for bibliographic records in WorldCat and evaluate whether a record matches the item being cataloged.	Tue, Oct 20, 2026 – 2:00–3:00 PM	Register
Connexion Client 3: Record Editing and Processing Work with MARC bibliographic records: field help, editing, updating holdings, and exporting or replacing WorldCat records.	Tue, Nov 3, 2026 – 2:00–3:30 PM	Register
Connexion Client 4: Save Files and Batch Processing Use batch processing and save files to efficiently manage high volumes of searches and record actions.	Tue, Nov 17, 2026 – 2:00–3:30 PM	Register
Connexion Client 5: Automation and Customization Automate repetitive cataloging tasks using constant data, text strings, keymaps, user tools, and macros.	Tue, Dec 1, 2026 – 2:00–3:30 PM	Register
Connexion Client 6: Authority Control Search, verify, and control headings in bibliographic records for original and copy cataloging.	Tue, Dec 15, 2026 – 2:00–3:30 PM	Register

Cataloging — WorldShare Record Manager

Instructor-led courses for libraries that use WorldShare Record Manager for copy cataloging, original record creation, and authority control.

Course	Date & Time (Eastern)	Register
Introduction to Editing WorldCat Bibliographic Records Basic navigation of User Preferences and copy cataloging tasks: searching, editing, exporting, and setting holdings.	Wed, Oct 14, 2026 – 2:00–3:00 PM	Register
Create and Manage WorldCat Bibliographic Records Create new WorldCat records using text/field strings, constant data, and advanced actions; derive records from templates.	Tue, Nov 10, 2026 – 2:00–3:00 PM	Register
Authority Control Search and browse the LC authority file, control headings in bibliographic records, and export authority records.	Tue, Dec 8, 2026 – 2:00–3:00 PM	Register

Cataloging — WorldShare Collection Manager

Instructor-led courses covering Collection Manager and editing WorldCat knowledge base collections via the user interface or KBART files.

Course	Date & Time (Eastern)	Register
Collection Manager: What It Is and How Libraries Use It Introduces Collection Manager's purpose, interface, and collection types so libraries can manage e-resource and print metadata.	Tue, Sep 29, 2026 – 2:00–3:00 PM	Register
Collection Manager: Edit WorldCat Knowledge Base Collections with User Interface Search, select, and edit WorldCat knowledge base collections and create local collections using the Collection Manager interface.	Tue, Oct 13, 2026 – 2:00–3:30 PM	Register
Collection Manager: Use KBART Files to Edit WorldCat Knowledge Base Collections Use KBART files to edit collections, add titles, and promote a local collection to the global WorldCat knowledge base.	Tue, Oct 27, 2026 – 2:00–3:30 PM	Register

WorldShare Interlibrary Loan (WorldShare ILL)

Instructor-led courses for established lending and borrowing workflows. Introductory sessions are available in the self-paced training section.

Course	Date & Time (Eastern)	Register
WSILL Lending – Configurations for Lenders Configure deflections, copy/loan policies, Days to Respond, automation, and real-time availability as a lender.	Thu, Oct 29, 2026 – 1:00–2:00 PM	Register
WSILL Lending – Manage and Respond to Requests Respond to requests, use batch processing, resolve issues, and generate/analyze lending statistics reports.	Thu, Nov 5, 2026 – 1:00–2:00 PM	Register
WSILL Borrowing – Borrowing Requests Create and process staff-initiated ILL requests and allow/mediate patron-initiated ILL requests.	Thu, Sep 17, 2026 – 1:00–2:00 PM	Register
WSILL Borrowing – Manage ILL Requests as Borrower Manage requests via batch processing, resolve issues, request renewals, and generate borrowing statistics reports.	Thu, Sep 24, 2026 – 1:00–2:00 PM	Register

Full WorldShare ILL training page: [help.oclc.org – Upcoming WorldShare Interlibrary Loan training](https://help.oclc.org/Upcoming_WorldShare_Interlibrary_Loan_training)

Full live training catalog (all OCLC products): [help.oclc.org – Upcoming training](https://help.oclc.org/Upcoming_training)

Self-Paced Training

Recorded courses, short videos, simulations, and quizzes that library staff can complete at their own pace. Each link opens the full catalog of self-paced materials for that product.

- [Connexion Client](#) — Cataloging — recordings covering copy and original cataloging workflows in Connexion client.
- [WorldShare Record Manager](#) — Cataloging — recordings, simulations, and videos for editing and creating WorldCat records online.
- [WorldShare Record Manager Fundamentals](#) — Cataloging — introductory recordings and videos for staff new to WorldShare Record Manager.
- [WorldShare Collection Manager](#) — Cataloging — recordings and videos on managing WorldCat knowledge base collections and metadata.
- [WorldShare Collection Manager Fundamentals](#) — Cataloging — shorter introductory videos for libraries using the Fundamentals tier.
- [WorldShare Interlibrary Loan](#) — WorldShare ILL — quizzes, recordings, simulations, and videos covering borrowing and lending workflows.
- [FirstSearch](#) — recordings and videos on searching and using the FirstSearch interface.
- [WorldCat Discovery](#) — recordings and videos on searching, discovery features, and end-user experience.

Full self-paced training catalog (all OCLC products): [help.oclc.org – Self-paced training](https://help.oclc.org/Self-paced_training)

OCLC Cataloging Community Meeting

This free virtual community event provides an opportunity to hear about important work by community members and to learn about OCLC cataloging and metadata services.

Course	Date & Time (Eastern)	Register
OCLC Cataloging Community Meeting — Session 1 Metadata Panel: Community Implementation of Official RDA. WorldCat Quality Updates.	Tue, Sep 22, 2026 – 11:00 AM–12:30 PM ET	Register
OCLC Cataloging Community Meeting — Session 2 Metadata Panel: Transforming cataloging workflows with Snapicat, a new tool using WorldCat Metadata API. OCLC cataloging products update: Previewing Connexion 4.0, WorldShare Record Manager, OCLC's BIBFRAME Editor, new CONTENTdm.	Wed, Sep 23, 2026 – 11:00 AM–12:30 PM ET	Register

OCLC events calendar (all upcoming events): [oclc.org – Events](https://oclc.org/events)