BLUEcloud Cataloging Trainer Guide
3 Contact Hours

Optional Training Activities
- Optional training activities are estimated to add 60 minutes to the original training time and include the minutes indicated for the original activity.

Learning Objectives

Participants in the BLUEcloud Cataloging class will achieve the following objectives:

- Successfully log into BLUEcloud Central.
- Set context to the desired institution (school building).
- Search multiple targets and use facets to limit your search.
- Edit bibliographic data manually, using the MARC Editor.
- Edit bibliographic data using shortcuts/drag and drop.
- Update/improve bibliographic records by merging or overlaying from other databases.
- Create/Edit call number and item/copy records.
- Use a Z39.50 target to import a record.
- Create and Modify records in batch.
- Add a new record using a template.
- Reflect on learning by sharing information with others.

In this course, participants will work through several lessons to learn how to access and use BLUEcloud Cataloging. Below is a description of each lesson and the amount of time it should take for participants to complete each one.

Getting Started

Pretest

- **Lesson Content**
  - Take a quiz to find out what you know or need to know about BLUEcloud Cataloging. (5 minutes)

Welcome to the BLUEcloud Cataloging Class

- **Lesson Content**

    Review the course objectives and the course overview. (10 minutes)

Optional Training Activity
- In small groups, discuss what you hope to learn about BLUEcloud Cataloging. Note any specific features you hope to have available. (5 minutes)

Using Open Space Groups

- **Lesson Content**

    Join the BLUEcloud Library Services group in Open Space. (5 minutes)

How to Navigate BLUEcloud

- **Lesson Content**

    Log into BLUEcloud using your BLUEcloud credentials. Read the lesson material and watch the included video to become familiar with the available menus. (15 minutes)

Optional Training Activities
- Have library staff practice logging in and out of BLUEcloud multiple times including setting their institution context.
- Have library staff note any links they would like to see added to Connections. Discuss the suggestions with the rest of the group. Final suggestions should be emailed to the Provider. (10 minutes)

Searching with BLUEcloud Cataloging

BLUEcloud Search: Find Titles and Copies

- **Lesson Content**

    Read the lesson material on Basic Cataloging and watch the included video. Become familiar with the cataloging search by practicing using the attached exercises. Take a few minutes and practice using the shortcut keys in Manage Holdings to help streamline the cataloging process. (15 minutes)

Optional Training Activities
- In small groups, library staff will each complete a search using a different search field (such as Title, Author, ISBN, etc.). Discuss the pros and cons of the search performed. Note any comments, difficulties, or questions and share them with the larger group. (10 minutes)

Editing Bibliographic Data

Editing Bib Data

- **Lesson Content**

  Read the lesson material and watch the corresponding video. Try using the MARC editor shortcut keys to help streamline the cataloging process. (20 minutes)

Smart Search

- **Lesson Content**

  Read the lesson on Smart Search to learn how to enhance your bibliographic records. Watch the included video. Use the Smart Search shortcut keys to streamline the process. (20 minutes)

Optional Training Activity

- In small groups, practice locating a variety of fields, such as ISBN, Summary, Subject Heading, Reading Program, and Series Information. Using the Helper Icon, groups should access the Library of Congress website and explore the MARC Standards for the specific field they were assigned. Discuss as a large group what makes a good record. (10 minutes)

What Have You Learned So Far?

- **Lesson Content**

  Take a short quiz to check what you know. (5 minutes)

Manage Holdings

Adding an Item and Call Number

- **Lesson Content**

  Read the lesson material and watch the corresponding video. Try using the MARC editor shortcut keys to help streamline the cataloging process.
  (15 minutes)

Batch Modify

- **Lesson Content**

  Read the material provided on Batch Modify. Watch the video. (10 minutes)

Batch Create

- **Lesson Content**

  Read the material provided and watch the corresponding video on how to create items in batch. (10 minutes)

> **Optional Training Activity**
> - In small groups, discuss and create a plan for how you would use the cataloging features in Manage Holdings to add a large number of textbooks/Chromebooks/iPads/laptops/etc. to the library collection. Groups will present the plans to the larger group. (10 minutes)

Adding New Records Manually

Importing Bibliographic Records

- **Lesson Content**

    Read the lesson on importing bibliographic records. Watch the corresponding video. (15 minutes)

Original Cataloging with Templates

- **Lesson Content**

    Read the lesson material on Original Cataloging with Templates. Follow along using BLUEcloud. Watch the corresponding video. (20 minutes)

> **Optional Training Activity**
> - In small groups have each group member search for the same record using a different Z39.50 target. Discuss any differences in the initial method of searching and the resulting hits. Discuss if there is a preference to search ALL Targets or only individual targets. Note any questions and discuss with the larger group. (10 minutes)

Checking Your Learning

Self-Assessments

- **Lesson Content**

    Answer questions to reflect on what you learned. (10 minutes)

> **Optional Training Activity**
> - Discuss any unanswered questions users may have or if completing this individually, direct any unanswered questions to your INFOhio Provider via email and/or answer the discussion questions from the lesson in the [BLUEcloud Library Services](#) Open Space group. Find the *Your Reflections on BLUEcloud Cataloging* post in the Discussions tab. (5 minutes)

Contact Hour Quiz and Certificate

- **Lesson Content**

    Take a quiz to earn a contact hour certificate. (5 minutes)

June 2023

INF🔘hio

Questions? Contact support@infohio.org.

INFOhio is Optimized by the Management Council