Guide to Contacting
OCLC Product Support and Training

Make the call

1-800-848-5800

Benefits based on more than 40 years of library cooperation

Since 1967, OCLC has focused on meeting the unique needs of libraries, museums, archives and information centers—today, more than 71,000 of these institutions worldwide realize efficiencies using OCLC services. In addition to offering more than 40 products and services, OCLC’s history is rich with many other benefits developed on behalf of its members—from research, reports and advocacy initiatives to providing forums for thought leadership.

OCLC connects the world’s libraries. And effective July 1, 2009, OCLC is centralizing and expanding its capacity to connect with you directly for all of your product support and training needs. This guide outlines the resources available to you for questions related to support, billing, ordering and training.

Your questions help us improve

When you contact OCLC Support, your comments and questions are used to improve the quality of our products and help us to evaluate our customer service interactions. By working directly with OCLC Support, you are closer to the source—closer to product development, closer to technical support solutions and closer to the many other benefits of the cooperative. Your feedback shapes how OCLC delivers its services to member libraries around the world.

You drive innovation

OCLC libraries have a key role in shaping the future of the organization—and the industry. When you subscribe to OCLC products and services, you are contributing to the cooperative. In addition to providing products and services, OCLC reinvests in the global library community by offering thought leadership, fostering communities of user groups, conducting and publishing research and advocacy reports, and much more. And through participation in a structure of Regional Councils and a Global Council, members help ensure that OCLC continues to meet the needs of its member libraries.
OCLC Product Support
We’re here to help.

We’ve significantly realigned our resources to serve you better. OCLC’s Product Support teams are available to meet your needs 14 hours a day, five days a week. Our support professionals have, on average, more than 10 years of experience providing support to OCLC libraries and users.

In addition to our teams of product support specialists and our consultative team, OCLC has added both staff and technology to ensure efficiency throughout our operations. Trend analysis, closer coordination with OCLC’s product development groups, call quality monitoring, consistent scheduling and reduced hold times are just a few improvements we’ve made within our support teams.

OCLC Support
Hours: Monday–Friday, 7 am–9 pm (EST)
E-mail: support@oclc.org
Support Form: https://www3.oclc.org/app/contact/

Empowered to achieve more

Making sure your library gets the most out of OCLC services is easier than ever. Whether you need help with basic functionality or a recommendation on configuration, OCLC Support ensures that your library maximizes your use of OCLC products and services. It’s one of the benefits of your membership—it empowers you to achieve more.

“I am new to my current position and was looking for some clarity regarding an automated e-mail that was sent to our former director. Kristina could not have been more helpful and courteous. She provided me with answers and areas to review for future use.”

— Dr. Paul Howell, Orland School District 135

“I had an issue with one of our EZproxy machines. David took the call and quickly determined the problem; I had an incorrect configuration. He had us online in no time. I [also] briefly asked him about the LDAP issue. He took the time to give me a detailed explanation and later sent along a very informative e-mail.”

— Jim Hutchens, Nova Southeastern University

Meet OCLC’s Support teams

OCLC has organized its support into three specialized teams, by product sets, to give librarians and users expert answers to your questions. We also have a new Consultative Services Group within OCLC Support. The following pages give details of each of the product support teams.

We value the positive impact that quality relationships have on the workplace. As on-demand extensions of your library’s staff, we will treat you with courtesy and respect every time you contact OCLC. Our full Support team is comprised of more than 35 support specialists. Allow us to introduce a few of them to you.
OCLC Product Support—NetLibrary, QuestionPoint and EDX Team

This support team answers questions pertaining to NetLibrary eBooks and eAudiobooks, and also Electronic Data Exchange (EDX) and QuestionPoint virtual reference service.

Some topics we can help you with:

**NetLibrary**
- Assistance with downloads and configuration
- View eBooks or eAudiobooks that are available to users via their library
- Manage eBooks and eAudiobooks in the Library Resource Center
- Number and length of time that eAudiobooks can be checked out

**QuestionPoint**
- Pull reports and statistics
- Assistance with features like chat and co-browse
- Help with forms manager to create chat forms
- Questions about implementing Qwidget

**EDX (Electronic Data Exchange)**
- Create an EDX account
- Retrieve files
- Authorize vendors or consortium to retrieve files

*Pictured from left to right:*
Virolita, Senior Support Analyst
Bryon, Senior Support Analyst
Ray, Senior Support Analyst
Aarius, Support Analyst
Mike, Senior Support Analyst

This group has the expertise you need to answer questions related to Contract Cataloging, Connexion, CatExpress, FirstSearch, WorldCat.org, WorldCat Registry, WorldCat Local and WorldCat Local “quick start,” and WorldCat Resource Sharing. From inquiries about copy cataloging and record creation to editing records in WorldCat, we can help with the technical application of OCLC’s products and services that help your library increase the visibility of its holdings.

**Some topics we can help you with:**

**WorldCat Cataloging**
- Unlock records for editing
- Authorizations and administrative passwords for Connexion and CatExpress interfaces
- Batchload records
- Find your institution’s usage statistics
- Search and export records
- Assist with profiling changes

**WorldCat FirstSearch**
- Authorizations and administrative passwords for FirstSearch
- Update your IP addresses for FirstSearch
- Find your institution’s usage statistics

**WorldCat Local**
- Customization requests
- Holdings questions
- Access WorldCat Local “quick start” configuration and reset passwords

**Resource Sharing**
- Check the status of requests
- Print requests, book stickers and bookstraps
- Resolve IFM questions

Pictured from left to right:
Tony, Senior Support Analyst  
Nicole, Customer Support Information Coordinator  
Stephen, Support Analyst

1-800-848-5800
OCLC Product Support—ILLiad, EZproxy and CONTENTdm Team

This team provides technical support for hardware, software and connectivity to other systems, as well as EZproxy, OCLC’s authentication and access solution. The team also supports ILLiad Resource Sharing Management Software and CONTENTdm software, OCLC’s searchable solution that helps you store, manage and deliver your library’s full range of media types to the Web.

Some topics we can help you with:

**ILLiad**
- Connect to an SQL server
- Process queued items in “Electronic Deliver”
- Access LDAP authentication through ILLiad Basic Authentication

**CONTENTdm**
- Index collections
- Load images
- Fix broken link images
- Group items within a collection and create links to those groups

**EZproxy**
- Resolve firewall issues
- Set up EZproxy as a Windows service
- EZproxy configuration questions

_Pictured from left to right:_
David, Consulting Support Analyst
Steven, Consulting Support Analyst
Peter, Consultative Services and Support Analyst
David, Senior Support Analyst
Doug, Consulting Support Analyst

Within OCLC Support, we have created the Consultative Services Group, a team dedicated to going beyond technical support—often working behind the scenes as well as directly with you. When you contact OCLC Support, you will be connected with the group or individual with the right skills to meet your unique questions. Depending on the complexity of your needs, you may be transferred to one of our Consultative Service and Support Analysts in this group.

Librarians in the Consultative Services Group speak your language. They hold Masters of Library Science degrees and have both real-world library experience and expert knowledge of OCLC products and services. They know the complexity of your work and the challenges you face. They can recommend solutions, resources and training. This team also provides more ongoing support, helping you to structure and streamline your library’s workflow, and assisting with the orchestration of batchloading your library’s records into WorldCat.

Pictured from left to right:
Kathy, Consultative Services and Support Analyst
Carol, Consultative Services and Support Analyst
Jody, Consultative Services and Support Analyst
Billing and Invoice Questions

OCLC and OCLC Service Partners will both continue to provide billing assistance. If you work directly with OCLC, call 1-800-848-5800 + 1 + 2 or e-mail support@oclc.org for questions about your OCLC invoice. If the invoice in question originates from an OCLC Service Partner, please contact that organization for assistance. If you are unsure about whom you should contact, please refer to the contact information printed on your invoice.

Ordering OCLC products and services

Ordering directly from OCLC

All OCLC products and services can be ordered by submitting an online form, available at www.oclc.org/us/en/ordering/. For select products, you can create, access and manage your library’s orders and renewals through OCLC’s Online Service Center: www.oclc.org/us/en/servicecenter/.

Phone: 1-800-848-5878
E-mail: orders@oclc.org

Obtaining ordering assistance from an OCLC Service Partner

Your Service Partner can provide ordering assistance, which may include:

- Locating order forms
- Completing and submitting order forms
- Renewals
- Requesting an OCLC Online Service Center account
OCLC Training

Learn more with OCLC Training

OCLC offers many options to obtain quality instruction. From online and in-person training to self-paced, Web-based tutorials, you can take advantage of learning opportunities from OCLC—or from any of our OCLC-certified Training Partners. OCLC also provides custom training services, giving you the option to define your own learning objectives so that you can achieve more. From basic instruction on OCLC products and services to workflow analysis, grant writing and advocacy efforts, the OCLC Training team has professionals with the expertise you want and need.

OCLC’s curriculum

OCLC has developed a curriculum that aligns specific learning objectives with industry roles and OCLC products and services. Whether you obtain your training from OCLC or one of OCLC’s certified training providers, the curriculum is designed to ensure that you get the most out of OCLC products and services. Courses include basic and advanced levels of instruction, in addition to custom training.

OCLC’s new Web-based Training Portal

OCLC partners with many organizations to bring you quality instruction. OCLC and its national network of Training Partners have come together to create a single Training Portal on http://training.oclc.org—one place for you to discover, manage and track your professional development. From industry trends to leadership, and from online or self-paced to face-to-face instruction, you now have access to more education and training offerings.

OCLC Training
E-mail: training@oclc.org

NEW OCLC Training Portal: http://training.oclc.org

For any question you have, we will guide you to the right resource.

Press 1 then 4 to access the product support options below

1. NetLibrary eBooks and eAudiobooks
2. QuestionPoint
3. EDX: Electronic Data Exchange, File Transfer, Product Services Web
4. WorldCat Services: FirstSearch, WorldCat.org, WorldCat Registries, WorldCat Local (and “quick start”)
6. Cataloging: Connexion, CatExpress, WorldCat Selection
7. ILLiad
8. CONTENTdm
9. EZproxy software and configuration

Questions about your OCLC invoice:
Press 1 then 2

Questions about OCLC Training:
Press 1 then 1
OCLC
Support Promise

We will reinforce and enhance the value of membership by providing you with outstanding service and support.

1-800-848-5800