OCLC Cataloguing Community Meeting
– for libraries in Australia and New Zealand

15 MAY 2024
Welcome

Ryan Sutherland
General Manager ANZ
OCLC
Today’s schedule

1. Welcome

2. Community presentations:
   a) Implementing Official RDA at the National Library of New Zealand
   b) Towards equitable and inclusive metadata at Museums Victoria Library
   c) Q&A
Today’s schedule

1. Welcome

2. Community presentations:
   a) Implementing Official RDA at the National Library of New Zealand
   b) Towards equitable and inclusive metadata at Museums Victoria Library
   c) Q&A

4. OCLC cataloguing update
   a) Q&A

5. Closing
Housekeeping…

Webex

- If your computer audio is not working, please dial-in by phone
  - Dial-in information has been posted in Chat

- To submit questions, use Chat and send to “All Panelists”
Housekeeping…

Webex

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  - Dial-in information has been posted in Chat
- **To submit questions**, use Chat and send to “All Panelists”

![Captions](image.png)

- This event has automatic captions enabled — you may toggle this feature on and off.
- Look for the “CC” icon in the lower left corner of the screen.

#OCLCcataloging
Post-event

- OCLC will make available:
  - Recordings of each session
  - Slides
  - Cited links list
- Notifications:
  - Registrants will receive an email
  - OCLC will post links to content:
    Cataloging & Metadata | oc.lc/cataloging-community-meetings
Community Presentations

Elizabeth Dilevska
Marketing Communications Executive ANZ
OCLC

#OCLCcataloging
Implementing Official RDA at the National Library of New Zealand

Anoushka McGuire
Team Leader, Cataloguing Team 1
National Library of New Zealand
Te Puna Mātauranga o Aotearoa

Towards equitable and inclusive metadata at Museums Victoria Library

Gemma Steele
Librarian
Museums Victoria Library

#OCLCcataloging
Anoushka McGuire

Team Leader, Cataloguing Team 1

National Library of New Zealand
Te Puna Mātauranga o Aotearoa
Implementing Official RDA at the National Library of New Zealand

Anoushka McGuire (Team Leader, Collection Description)
Te Puna Mātauranga o Aotearoa National Library of New Zealand
Before setting off: our context
Starting the journey
NLNZ RDA Attributes Policy

This document covers all attributes policy decisions made by National Library of New Zealand (NLNZ) for use by NLNZ staff. It is intended to be used in conjunction with the NLNZ Relationships Policy workflow, and NLNZ maps on the RDA Toolkit relating to specific situations.

If you notice a discrepancy in these policies, or you are interested in our policy for a particular RDA instruction, please contact the National Library of New Zealand cataloguing teams at this email: nznb@dia.govt.nz

Reasons for establishing NLNZ policy

NLNZ has established policy generally where (either/or):

- LC-PCC PS exists
- prior NLNZ policy differs from the RDA rule as written
- where the statement “considered to be important” occurs in the rule
- where there is an optional addition in the rule
- where there is an alternative to the rule

NLNZ will catalogue serials following the CONSER standard record practice unless instructed otherwise in the policies below

Table of Contents

Chapters 0 & 1: General guidelines

Chapter 2: Manifestations and Items
Deep in the forest
<table>
<thead>
<tr>
<th>Domain</th>
<th>Manifestation Identifier for the manifestation</th>
<th>Identifier for manifestation</th>
<th>Recording identifier 2</th>
<th>Any</th>
<th>radm-P</th>
<th><a href="https://beta.rdatoolkit.auckland">https://beta.rdatoolkit.auckland</a></th>
<th>In progress</th>
<th>yes</th>
<th>Apply</th>
<th>Group</th>
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<td>Vocabulary</td>
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<td>other structured description</td>
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<td>Group</td>
</tr>
<tr>
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<td>recording structured description 3</td>
<td>Recording structured description</td>
<td>another structured description</td>
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<td>Apply</td>
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<td>Recording structured description</td>
<td>recording structured description 4</td>
<td>Recording structured description</td>
<td>another structured description</td>
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<td>Group</td>
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<td>another structured description</td>
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<td>In progress</td>
<td>yes</td>
<td>Apply</td>
<td>Group</td>
</tr>
</tbody>
</table>

[Check where we want to record this and therefore whether it is possible to record the source of information]
title proper

Definition and Scope
A nomen that is a title of manifestation that is selected for preference in a specific application or context.

An alternative title is treated as part of a title proper.
Entities > Manifestation > title proper

title proper

Definition and Scope
A nomen that is a title of manifestation that is selected for preference in a specific application or context.

An alternative title is treated as part of a title proper.

Select Policy Statement Set (4)
- NLNZ PS (24)
- Show None
- BLPS (22)
- LC-PCC PS (24)
- MLA BP (24)
- NLNZ PS (24)

Prerecording
A title proper does not include:

“Screen image from the RDA Toolkit (www.rdatoolkit.org) used by permission of the Co-Publishers for RDA (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals)”
OPTION

Record a value in the language or script of the main expression that is embodied by a manifestation.

Example

NLNZ PS

In most cases apply. Do not apply for a publication in English with prominent Māori language title: choose title proper on the basis of the sequence, layout, or typography of the titles on the source of information.

“Screen image from the RDA Toolkit (www.rdatoolkit.org) used by permission of the Co-Publishers for RDA (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals)”
OPTION

Record a value that is found on a container.

Example

NLNZ PS

Apply.

See NLNZ guidance.
NLNZ guidance

<table>
<thead>
<tr>
<th>Version</th>
<th>License</th>
<th>Category</th>
<th>Last Updated</th>
<th>URIs</th>
<th>Files</th>
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<td>CC BY</td>
<td>LocalPolicy</td>
<td>2024/02/07</td>
<td></td>
<td></td>
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</tbody>
</table>

- NLNZ guidance - DRAFT - January 2024 release.docx

The National Library of New Zealand Guidance supports cataloguers to apply NLNZ Policy Statements when using the RDA Toolkit.

You can download the NLNZ guidance document by clicking on the link above. Please note that the NLNZ guidance is still a Work-in-Progress and is not complete or finalised.

If you have specific questions about NLNZ RDA policy, please get in touch with the NLNZ cataloguing teams at nznb@dia.govt.nz

*NLNZ cataloguers: please use the locally saved copy of the NLNZ guidance while training.
StaticNonAggregateText MAP

<table>
<thead>
<tr>
<th>Version</th>
<th>License</th>
<th>Category</th>
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<th>URIs</th>
<th>Files</th>
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</thead>
<tbody>
<tr>
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<td>CC BY</td>
<td>ApplicationProfile</td>
<td>2024/02/07</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

StaticNonAggregateText Metadata Application Profile

- Lists the elements that must always be present in descriptions for this type of resource ("mandatory").
- Lists commonly used elements in descriptions for this type of resource. If they apply to the resource they must be included in the description ("if applicable").
- Does not include every possible Work and Expression relationship element that could apply to the resource.

**Required values**

If any of your values for these elements do not match the table, select a different MAP for your resource.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Element</th>
<th>First instance</th>
<th>Additional instances</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>extension plan</td>
<td>mandatory</td>
<td>no</td>
<td>static plan</td>
</tr>
<tr>
<td>Manifestation</td>
<td>Check definitions in NZ Aggregates guidance document</td>
<td>mandatory</td>
<td>no</td>
<td>conclusion must be NonAggregate</td>
</tr>
<tr>
<td>Expression</td>
<td>content type</td>
<td>mandatory</td>
<td>no</td>
<td>text</td>
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</table>

**MAP elements**

<table>
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<th>First instance</th>
<th>Additional instances</th>
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</thead>
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<td>if applicable</td>
<td>no</td>
</tr>
<tr>
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<td>carrier type</td>
<td>mandatory</td>
<td>no</td>
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</tbody>
</table>
Near the summit
Training
Sharing our training

Please email us!

nznb@dia.govt.nz
Our current timeline

July 2024  August 2024  End-2024
At the summit
What comes next?
New elements, new MARC

335 ## $a static plan $2 rdaep
New elements, new MARC

758 ## $4 http://rdaregistry.info/Elements/m/P30139 $i
Expression manifested: $a Tui, Ruby. Straight up. English
Old elements, new MARC

Original RDA: 500 ## $a Aspect ratio: widescreen.

Official RDA: 345 ## $d wide screen
Minor tweaks to MARC codes

Original RDA:

336 $2 rdacontent
337 $2 rdamedia
338 $2 rdacarrier

Official RDA:

336 $2 rdaco
337 $2 rdamt
338 $2 rdact
Nearing the end?
The next mountain?
Questions?

nznb@dia.govt.nz

or

anoushka.mcguire@dia.govt.nz
Image credits

- **Starting the journey**: Trampers on Rangitoto Island, 1930. Auckland Libraries Heritage Collections 282-0295 via https://digitalnz.org/records/43821873/trampers-on-rangitoto-island-1930
- **Deep in the forest**: Trampers move through typical West Coast Beech Forest. (Kellys Hut Track.). Archives New Zealand Te Rua Mahara o te Kāwanatanga via https://digitalnz.org/records/48427927/sports-tramping
- **At the summit**: Hot chocolate on Ruapehu, 1933. Auckland Libraries Heritage Collections 282-0421 via https://digitalnz.org/records/37922576/hot-chocolate-on-ruapehu-1933
Gemma Steele
Librarian
Museums Victoria Library
Towards equitable and inclusive metadata at Museums Victoria Library

Gemma Steele
gsteele@museum.vic.gov.au
15 May 2024
'Conscious Cataloguing'

A deliberate and critical use of language. Striving to work in a way that is reflective.

• Ability
• Age
• Class and economic status
• Food
• Gender and sex
• Geopolitics and language
• Health
• Housing and space

• Immigration, refugees, and asylum seekers
• Indigeneity and ancestry
• Police and incarceration
• Race and ethnicity
• Religion
• Science and the environment
• Sexuality

Adapted from Thomas & Hirsch, Sum Of Us’ A progressive’s style guide
Making a Start

Education, awareness, critical thought, and reflection.

Rachel L. Frick, Merrilee Proffitt, OCLC Research – Reimagine Descriptive Workflows (2022)

Carissa Chew – Inclusive Terminology: Guide & Glossary for the Cultural Heritage Sector (2021-)

Sunshine State Digital Network – Introduction to conscious editing series (2020)

Cataloguing Ethics Steering Committee – Cataloguing Code of Ethics (2019-)


Indigenous Cultural Materials

Education, awareness, critical thought, and reflection.

Tui Raven – *Guidelines for First Nations Description* (2023)

Nathan Sentence, University of Sydney Library – *Aboriginal and Torres Strait Islander Cultural Protocols* (2021)

National and State Libraries Australasia –

Aboriginal and Torres Strait Islander Library, Information and Resource Network – *ATSILIRN protocols for libraries, archives and information services* (2012)

Raelee Lancaster – *Fact or Folklore? An Aboriginal and Torres Strait Islander Framework to Cataloguing Indigenous Knowledge* (2023)

Antonia Mocatta, Ryan Stoker, Lisa McIntosh – *A Methodology for Surveying Indigenous Collections at an Australian Academic Library* (2024)
Actions Speak Louder Than Words

Aims, Workflows, Projects
1. 'Non-Standard' Vocabularies

Integrating vocabularies other than LCSH/FAST. Vocabularies by and for communities. Conscious integration as part of workflow.

- AIATSIS Pathways
- AUSTLANG
- Ngā Ūpoko Tukutuku / Māori Subject Headings
- Glossary of Disability Terminology
- Homosaurus
- Women's Thesaurus

- Netanel Ganin – Queer LCSH
- Trans and Gender Diverse LCSH
- Australian extension to LCSH
- LOC Subject Heading and Term Source Codes
<table>
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<tr>
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<td>Australia</td>
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<td>Hunting and gathering societies</td>
<td>X</td>
<td>Australia</td>
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<tr>
<td>650</td>
<td>6</td>
<td>Australians (Aboriginals)</td>
<td>X</td>
<td>Moeurs et coutumes</td>
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<tr>
<td>650</td>
<td>6</td>
<td>Australians (Aboriginals)</td>
<td>X</td>
<td>Agriculture</td>
</tr>
<tr>
<td>650</td>
<td>6</td>
<td>Utilisation agricole du sol</td>
<td>X</td>
<td>Australia</td>
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<tr>
<td>650</td>
<td>6</td>
<td>Chasseurs-cueilleurs</td>
<td>X</td>
<td>Australia</td>
</tr>
<tr>
<td>650</td>
<td>7</td>
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<td>X</td>
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<tr>
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<td>Social life and customs</td>
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<tr>
<td>650</td>
<td>7</td>
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<td>$2 fast $0 (OCoLC)fs00904206</td>
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<tr>
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Dark Emu
by Bruce Pascoe

OCN: 10380 67363
ANBD: 6232 3070
Subjects:
Indigenous Collection
Indigenous collection.
Land use, Aboriginal Australian.
Landuse, Rural.
Hunting and gathering societies, fast
Colac (W Vic SJ54-12) aiatlissip
Tee Rak / Lake Condah (W Vic SJ54-11) aiatlissip
Nglyampa / Ngemba people (D22) (NSW SH55-10) aiatlissip
Gunditjmara / Gunukly / Dhauwurd-Wurrung people (S20) (Vic SJ54-11) aiatlissip
Yuin people (S67) (NSW SI56-13) aiatlissip
Wadi Wadi / Wathi Wathi people (D4) (Vic SI54-16) aiatlissip
Beaveridge, Peter.
Food - Preparation - Leaching, aiatlissip
McMillan, Angus.
Death - Mortuary / funeral ceremonies - Burial, aiatlissip
Buildings - Construction, aiatlissip
Gepper, Jemmy.
Sturt, Charles, 1795-1869.
Kuller Kullup.
Cobbone, Johnny.
Kirby, James.
Habitation - Camps - Hearths, ovens, fireplaces etc., aiatlissip
Brewarrina (N NSW SH55-06) aiatlissip
Food - Preparation - Cooking, aiatlissip
Buildings - Architecture and design, aiatlissip
Technology - Fire, aiatlissip
Aboriginal Australians, Torres Strait Islander and South Sea Islander.
Aboriginal Australians -- History.
Agriculture -- Australia -- History.
Environment - Climate and weather - Seasons, aiatlissip
Food - Sociocultural aspects, aiatlissip
Hunting, gathering and fishing, aiatlissip
Food - Meat - Kangaroo / Wallaby, aiatlissip

Environment - Biodiversity - Plants, aiatlissip
Environment - Resource management, aiatlissip
Subsistence and economy - Seasonality, aiatlissip
Food - Plants - Seeds / Flour, aiatlissip
Plants - Pandanus, aiatlissip
Animals - Marine mammals - Whales, aiatlissip
Nglyampa / Ngemba people D22, aiatlissip
Dhauwurd Wurrung people S20, aiatlissip
Yuin people S67, aiatlissip
Wadi Wadi people D4, aiatlissip
Fishing - Fish traps, aiatlissip
Food - Plants - Yams, aiatlissip
Plants - Nardoo, aiatlissip
Plants - Grasses, aiatlissip
Settlement and contacts - Colonisation, aiatlissip
History - Theory and criticism - Sources, aiatlissip
Settlement and contacts - Explorers - European, aiatlissip
Housing - Shelters, aiatlissip
Water supply - Wells and bores, aiatlissip
Hunting and gathering societies.
Aboriginal Australians -- Antiquities, fast
Aboriginal Australians -- Agriculture, fast
Aboriginal Australians -- Social life and customs, fast
Aboriginal Australians -- Agriculture, fast
Aboriginal Australians -- Social life and customs, fast
Hunting and gathering societies -- Australia.
Aboriginal Australians -- Antiquities.
Indigenous knowledge - Ecology, aiatlissip
Land use, Rural -- Australia.
Environment - Land management, aiatlissip
Australia -- History.
Australia, fast
Australia, aiatlissip
Screenshot from Trove Partner dashboard for Museums Victoria Library collection.

394 Languages

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<td>Warlpiri</td>
<td>C15</td>
</tr>
<tr>
<td>Pitjantjatjara</td>
<td>C6</td>
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<tr>
<td>Kunwinjku</td>
<td>N65</td>
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<tr>
<td>Pintupi</td>
<td>C10</td>
</tr>
<tr>
<td>Tiwi</td>
<td>N20</td>
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<td>Alyawarr</td>
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<td>Wemba Wemba</td>
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<td>Gamilaraay / Gamilaroi / Kamilaroi</td>
<td>D23</td>
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<td>Burarra</td>
<td>N82</td>
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<td>Dieri</td>
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<tr>
<td>Jingulu</td>
<td>C22</td>
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</tbody>
</table>

1,120 Codes on records

Records by Austlang Code

- Arrernte (C8)
- Alyawarr...
- Yankunytjatjara (C4)
- Gunai /

- Warlpiri (C15)
- Luritja (C7.1)
- Burarra (N82)
- Kaurna /

- Pitjantjatjara (C6)
- Kaytetye...
- Murrinh...
- Watha /

- Ngarrindjeri (S69)
- Gamilaraay / Gamilaroi / Kamilaroi (D23)
- Wiradjuri...
- Jawoyn...

- Kunwinjku (N65)
- Wemba...
- Anmaty...
- Djab W...

- Pintupi (C10)
- Gamilarai...
- Araban...
- Larraki...

- Tiwi (N20)
- Wiradjuri...
- Dhauwu...
- Ngiya...
2. Revisiting Classification

Biases in DDC.


Societal changes.

- Ethnology and Somatology (DDC 572/573)
- 'Folklore' (DDC 398)
- Dreaming and Dreamtime Stories
3. Remediation and Enrichment

Descriptors that are current, relevant, not offensive.
Local subject re-mapping.
Examine Intellectual Property.

- OCLC subject re-mapping template
- Foster v Mountford and Rigby Ltd (1976)
4. Flags and Context

Awareness and enrichment. 
Content warnings.
Restricted access collections.

• Traditional Knowledge Labels (TK Label)
• Biocultural Notices (BC Notice)
• "Content redacted due to secret/sacred material within it. Contact us for access to this item."
5. Right of Reply

Clear avenues.
Active encouragement.
Integrating community voices.

melbartlibrary Our previous Creative Resident Jahkarli Romanis looked critically at the MAL collection and questioned the position of libraries as gatekeepers of information by deciding what content does and doesn’t make it into the collection. Identifying texts in the library that were inappropriate, outdated, and problematic, we had many conversations about how to treat such books. Should these books be removed? Stored behind glass? Who decides what is or isn’t appropriate?

As an intervention into the collection, Jahkarli used tracing paper to annotate and update a text in the collection. Jahkarli advocated for this use of palimpsest - the layering and altering of text - in the library, rather than the removal of ‘problematic’ texts. Knowledge is never static.

Next time you’re at MAL, please take a sheet of tracing paper and some paper clips and add your own annotations and updates to books in the collection.

@jucromanis 🌟 🌟

Screenshots from Melbourne Art Library's Instagram page @melbartlibrary
6. Knowledge Sharing

Policies, procedures, documentation. Community voices. Communities of practice.

- "Location identified as Ernabella by Pitjantjatjara women elders during a visit to the NLA, 3 June 2010."

- ALIA Reparative Description Community of Practice

- "Moving at the speed of trust"

Screenshot from National Library of Australia, record for Pitjantjatjara children at Ernabella, South Australia, ca. 1946, 2 [picture], Bib ID 4927007
Thank you

Gemma Steele
gsteele@museum.vic.gov.au
Community presentations

Please enter questions in chat and send to all panelists
OCLC cataloguing update

Chelsea Dalgord
Product Manager, Metadata & Digital Services
OCLC
OCLC cataloging community meeting

OCLC cataloguing update

Chelsea Dalgord
Product Manager, Metadata & Digital Services

Cynthia Whitacre
Senior Metadata Operations Manager, Metadata Engagement

Jeff Mixter
Senior Product Manager, Metadata & Digital Services

Hank Sway
Product Manager, Metadata & Digital Services

#OCLCcataloging
Linked data
Expand influence and reach with linked data

- Connect and scale library knowledge
- Fuel serendipitous discovery
- Focus on high-value knowledge work
- Contribute to the global information ecosystem

oc.lc/linkeddata
Delivering on our linked data strategy

Expertise

Data

Infrastructure

Tools

oc.lc/linkeddata
Linked data entities

WorldCat® Entities

- Works
- Persons
- Organizations
- Events
- Places
- Concepts

Dewey® Services

FAST Linked Data
FAST Authority File

entities.oclc.org
WorldCat ontology

• Data model used to describe linked data entities in WorldCat Entities
• OCLC is working with partner libraries to expand the data model based on library workflows and data needs
• Worked with the community to conduct a diversity, equity, and inclusion review of the data model
Linked data integrations
‘Linkifying’ WorldCat
WorldShare Record Manager

• Can lookup WorldCat Entities and insert linked data identifiers to records within your existing cataloging workflow

• WorldCat Entities URIs can be added to fields:
  - Person entity – 100, 600, or 700
  - Event entity – 647
  - Place entity – 651
  - Work entity – 758

• Once an entity is selected it will appear in the $1 of the field
## WorldCat Entities in MARC records

- WorldCat Entities identifiers display as a clickable link in WorldShare Record Manager and Connexion client.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>650</td>
<td>Institutional repositories $z United States $v Case studies.</td>
<td></td>
</tr>
<tr>
<td>650</td>
<td>Institutional repositories $2 fast $0 (OCoLC)fst01740466</td>
<td></td>
</tr>
<tr>
<td>700</td>
<td>Mixer, Jeff $1 <a href="https://id.oclc.org/worldcat/entity/E39FBJtRJyk1h8gwXj3JQ4cyd">Link</a></td>
<td></td>
</tr>
<tr>
<td>700</td>
<td>McMillan, Ciara.</td>
<td></td>
</tr>
</tbody>
</table>

- Functionality to lookup and select WorldCat Entities coming to Connexion client at a future date.

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#OCLCcataloging
## Jeff Mixter

**Entity ID:** E39PB7J7y3kHh8gw5xJ3Q4cyd  
**Entity Type:** Person  
**Description:** product manager at OCLC

### Key Information

<table>
<thead>
<tr>
<th>Language of Content</th>
<th>Entity Label</th>
<th>Description</th>
<th>Aliases</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>Jeff Mixter</td>
<td>product manager at OCLC</td>
<td>2</td>
</tr>
<tr>
<td>German</td>
<td>Jeff Mixter</td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>
Entities workflows
OCLC Meridian
Create, curate, and connect linked data in

oc.lc/meridian

#OCLCcataloging
OCLC Meridian

Create and curate entities
Connect nonlibrary datasets
Emphasize important relationships
Improve library discoverability
Contribute to a linked data future
OCLC Meridian

- Create a new Organization entity
OCLC Meridian

• Immediately access a linked data URI
OCLC Meridian

• Connect the new entity to other entities in the WorldCat graph
OCLC Meridian

- Find other connection points in the WorldCat graph
OCLC Meridian

• Connect them back to the new entity
OCLC Meridian

- Rich and meaningfully connected graph of data to serve library workflows
BIBFRAME workflows
BIBFRAME editor

• We’re developing a BIBFRAME editor to meet the needs of librarians as they transition to non-MARC formats and face new data needs and workflows

• The new editor will work seamlessly back-and-forth with BIBFRAME and MARC data so libraries can choose the data format best suited for their workflows, systems, and staff
BIBFRAME ingest/export
BIBFRAME ingest/export
BIBFRAME ingest/export
BIBFRAME ingest/export

MARC → WorldCat → bf: BIBFRAME

bf: BIBFRAME → WorldCat → MARC
WorldCat quality
Virtual AskQC Office Hours

May
Who's Your Audience? Ways to Record Audience in Bibliographic Records

June
Customizing MARC Record Delivery with Collection Manager

Registration at oc.lc/askqc
DDC Enrichment

- Since February of 2023, over 84 million DDC numbers have been added to WorldCat bibliographic records that lacked a number
- Routine updates several times a year will be completed
- An additional 4.8 million DDC numbers are in process of being added
- Saves time and increases efficiency for catalogers
- Class number came from other records in the same work cluster

- Example from OCLC #53407984:
  082 04 ǂa 581.943 ǂq OCoLC ǂ2 23/ger/20230216
Encoding Level Conversion Project

• Purpose of the project is to eliminate OCLC alphabetic encoding level values in WorldCat bibliographic records to standard MARC21 values
• This makes our records compatible with the standards used worldwide
• Encoding level values J, K, and I have been eliminated from WorldCat bibliographic records
• Conversion of value M is in progress
• Records converted from value M have field 936 added to the record:

  936__$_a BATCHLOAD
Machine Learning Deduplication

• Phase 1 completed August-October of 2023 resulting in 5.4 million duplicate records removed for print book records in English, French, German, Italian, and Spanish

• Community feedback was gathered through our data labelling tool for non-Latin scripts of Chinese, Japanese, Korean, Thai, Arabic, Hebrew, and Russian to use for future iterations of the model

• Next phase of ML deduplication is currently underway

• Using more features measuring the similarity between records across a larger set of fields/subfields to improve the ability to detect duplicates and reduce redundant data in WorldCat
WorldCat Entities URI Enrichment

- In December 2023, WorldCat Entities URIs were added to WorldCat bibliographic records
- Subfield $1s were added to MARC fields 100, 600, 647, 651, and 700
- Languages of headings: English, German, Dutch, Spanish, and French
- Total number of headings with subfield $1 insertions: 175M
WorldCat Entities URI Enrichment

Examples from OCLC #316483:

100 1_ $a Sevareid, Eric, $d 1912-1992, $e author. $1 https://id.oclc.org/worldcat/entity/E39PBJyrWWTFrcRkh4GtcffTHC

600 17 $a Sevareid, Eric, $d 1912-1992. $2 fast $0 (OCoLC)fst00037345 $1 https://id.oclc.org/worldcat/entity/E39PBJyrWWTFrcRkh4GtcffTHC

647 _7 $a World War $d (1939-1945) $2 fast $0 (OCoLC)fst01180924 $1 https://id.oclc.org/worldcat/entity/E39Qhp4vBbhpRH9XvjbDFXtxhb

651 _7 $a United States. $2 fast $0 (OCoLC)fst01204155 $1 https://id.oclc.org/worldcat/entity/E39PBJtxgQXMWqmjMjjwXRHgrq

700 1_ $a Stein, Gertrude, $d 1874-1946, $e contributor. $1 https://id.oclc.org/worldcat/entity/E39PBJhhpHr4vrM87p4BrDHjYP
The second phase of URI enrichment began the weekend of Jan. 27th with the addition of subfield $1 for Works. Total number of headings with subfield $1 insertions: 240M records.

Example for English language of cataloging:
758__$i has work: $a HBR’s 10 must reads on managing people Vol. 2 (Sound) $1
https://id.oclc.org/worldcat/entity/E39PCGDbpB6QKpK4gc9MwdDFVd $4
https://id.oclc.org/worldcat/ontology/hasWork

Example for French language of cataloging:
758__$i a pour œuvre: $a Le mouvement chrétien-social dans le canton de Genève (Text) $1
https://id.oclc.org/worldcat/entity/E39PCYvWdGxTkMYkvJgfF78Phw $4
https://id.oclc.org/worldcat/ontology/hasWork
WorldCat Entities in MARC records

- WorldCat Entities identifiers are included in MARC records through:
  - Export in WorldShare Record Manager
  - Export in Connexion
  - WorldCat Metadata API
  - Z39.50 Cataloging
  - Bulk output in WorldShare Collection Manager
Collection Manager
Metadata automation tools

WorldShare® Collection Manager

- WorldCat knowledge base collections
- WorldCat cataloging partner collections
- WorldCat query collections
- WorldCat updates
- WorldCat data sync collections

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oc.lc/get-cm
WorldCat Updates

Automatically receive updates as records change

Library Community

OCLC

Your Catalog

#OCLCcataloacting

oc.lc/cm-updates
Configure WorldCat Updates

- Record Manager
- My Labels

Collection Manager

Search
- Data Type: Collection
- Scope: My Selected Collections

Search Term(s)
- Search
- Clear

MARC Records
- Enable MARC Records Delivery: Yes/No

Institution Settings

Save

- OCLC Symbol
- Knowledge Base Data
- WorldCat Holdings
- Proxy and Authentication
- Provider Settings
- WorldCat Discovery

Customize Records
- WorldCat Updates
- Record Delivery
- Cataloging Partner Options

#OCLCcataloging

oc.lc/cm-updates
## Configure WorldCat Updates

### Updates Will Include
- **Receive updates when $1$ is modified**
  - Yes
  - No

### Field Changes in WorldCat Record
- **Tag**: 1, 5, 6, 7
- **Ind**: 1, Any
- **Ind 2**: Any

### Encoding Levels Changes
- Blank
- 5
- 1
- 7
- 8
- M

### Other Changes
- Date/Publication Status (DIST) changes
- 040 changes to include 040 so rda

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#OCLCcataloging

[oc.lc/cm-updates](http://oc.lc/cm-updates)
Configure WorldCat Updates

Excluding Types of Material
- Book
- Map
- Sound Recording
- Computer File
- Mixed Material
- Continuing Resource
- Score
- Visual Material

Excluding Electronic Resources
- Online
- Direct electronic
- Electronic

Excluding Publication Year
- 1983 and before

Exclude Records Upgraded by my Library
- TAWMS
WorldCat Query Collections

New titles added by your library?

Your holdings?
By format?
By date?

Subject-specific serials, books or journals?

All records for a specific subject today, and new titles?

Sample expert searches:

li:fga  [all records with FGA holdings]

li:fga AND mt:dvv

li:fga AND mt:sco AND yr:2010-

l4:fga  [for records with LHRs]

su: subject AND (mt:bks OR mt:dvv)

#OCLCcataloging

oc.lc/cm-query

oc.lc/indexes
Metadata automation tools

WorldShare® Collection Manager

- WorldCat knowledge base collections
- WorldCat cataloging partner collections
- WorldCat query collections
- WorldCat updates
- WorldCat data sync collections

#OCLCcataloging

oc.lc/get-cm
WorldCat knowledge base collections

- **Simplify and automate** your electronic workflows
- **Improve the quality** of your catalog
- Make your e-resources easier to **find, share and use**
- Automatically **maintain WorldCat holdings**
How knowledge base collections works

Register your collections...
OCLC automatically detects...

- new titles
- updates
- deletes

OCLC automatically...

- maintains WorldCat holdings
- delivers MARC records
Customize Records

Customize the information included in your institution's MARC records. You can also control MARC options for an individual collection at the collection level.

* Required field

### All Collections

<table>
<thead>
<tr>
<th>Holding Library Code (049 $a)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN</td>
</tr>
</tbody>
</table>

### Delete Fields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Any</th>
<th>Ind 2</th>
<th>Any</th>
<th>Reset</th>
</tr>
</thead>
</table>

### Delete Subfields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Any</th>
<th>Ind 2</th>
<th>Any</th>
<th>Subfield</th>
<th>Reset</th>
</tr>
</thead>
</table>

### Add Fields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Subfield</th>
</tr>
</thead>
<tbody>
<tr>
<td>590</td>
<td>Blank</td>
<td>Blank</td>
<td>a</td>
</tr>
</tbody>
</table>
What’s inside our KB?

79+ million records through over 28,000+ content collections from 676 providers

- Subscription packages
- Title by title purchases
- Open Access content
- Demand Driven Acquisitions
- Consortial versions
- Cooperatively created and managed
- Locally defined

For a complete list, visit oc.lc/kbcollections
Automated creation of WorldCat records

1. Titles added to WorldCat knowledge base
2. KB titles matched to WorldCat bibliographic records
3. New records created if no match
4. WorldCat holdings managed
5. WorldCat MARC records output
6. Titles discoverable in WorldCat and WorldCat Discovery

NEW!
WorldCat Updates

Automatically receive updates as records change

Library Community

oc.lc/cm-updates
WorldCat knowledge base collections

Automate your holdings management

Future partners:

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oc.lc/autoload
OCLC cataloguing update

Please enter questions in chat and send to all panelists

#OCLCcataloging
Final notes

Recordings, slides & links

• Watch your email
• Linked on the OCLC Community Center
  – Cataloging & Metadata
• Series site: oc.lc/cataloging-community-meetings
Recordings, slides & links

- Watch your email
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  - Cataloging and Metadata
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  - [oc.lc/cataloging-community-meetings](http://oc.lc/cataloging-community-meetings)

Continue the conversation

- Cataloguing policy
  - Email [AskQC@oclc.org](mailto:AskQC@oclc.org)
  - AskQC twice monthly webinars
- News, discussions, and more...
  - Cataloging and Metadata community
  - Record Manager community
  - Collection Manager community
  - Meridian community
Do you want to receive the latest OCLC research reports, events, products, and news?

Update your email preferences at:

oc.lc/mail
Stay in touch

ANZ contact: anz@oclc.org
Regional offices: https://oc.lc/offices
Community Center: https://oc.lc/community
Thank you
And thank you to our community!