First sessions

- Welcome
- WorldCat updates
  - Putnam
  - Culbertson
- Diversity, Equity, Inclusion
  - Baxmeyer
  - Brewer, Huang, Schlottmann
  - Lown, Whittenberger
- Short break
Today’s Schedule

First sessions

• Welcome
• WorldCat updates
  o Putnam
  o Culbertson
• Diversity, Equity, Inclusion
  o Baxmeyer
  o Brewer, Huang, Schlottmann
  o Lown, Whittenberger
• Short break

Final sessions

• OCLC product updates
  o Whitehair
• OCLC cataloging updates
  o Metadata quality staff
• Questions for OCLC
• Closing
David Whitehair
Director, Metadata Services

OCLC product updates
Connexion client 3.0

- New release of Windows-based Connexion client
- Release coming in the July/August timeframe
- Support for older versions will be discontinued in 2022 with minimum of 3 months advance notice
Changes of note

- No longer need to be an Admin on your PC to run the client or macros
- Macros are being relocated:
  - Currently installed to: C:\Program Files (x86)\OCLC\Connexion\Program\Macros
  - Being copied to: C:\Users<user>\AppData\Roaming\OCLC\Connex\Macros
  - Copying will happen automatically when the client is launched
  - Original macros will remain in the old directory
- Macro conversion:
  - Within each macro, every instance of `CreateObject("Connex.Client")` must change to: `GetObject(,"Connex.Client")`
  - Conversion will run automatically when the client is launched
User interface changes

• New splash screen
• Message of the day has been decommissioned
  • Replaced with welcome message
• The term “master record” has been replaced with “WorldCat record”
• “Master mode” authorization replaced with “Quality mode”
• New privacy policy
Decommissioned features

- Message of the day
- GLIMIR options
- Institution records functionality
- Harvest web content
- Metadata extraction
- Attach digital content
- RoboHelp replaced with online documentation
Master Record ➔ WorldCat Record

Connexion client
Master Record → WorldCat Record

Connexion browser
Cataloging applications included with your OCLC Cataloging and Metadata Subscription

- Connexion web-based browser
- Connexion Windows-based client
- WorldShare Record Manager
WorldShare Record Manager

- A modern, user-friendly interface
- Improved WorldCat search results to accelerate copy cataloging
- MARC 21 editor and Text View editor to create new or enrich existing items in WorldCat
- Support for numerous authority files, including Biblioteca Nacional de España (BNE), Canadiana, Dutch, German, Getty Art & Architecture Thesaurus (AAT), Library of Congress, Māori, MeSH, and Répertoire de vedettes-matière (RVM)
- A saved in-progress file that is sharable from both Record Manager and Connexion
- And many more...
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<td>1079206101</td>
<td>Hoboken, N.J. : John Wiley &amp; Sons</td>
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Authorities

- AAT (The Getty Art and Architecture Thesaurus)
- BNE (Biblioteca Nacional de España Spanish)
- Canadiana (Library and Archives Canada)
- GND (German National Library)
- LC (Library of Congress)
- Māori Subject Headings (National Library of New Zealand)
- MeSH (National Library of Medicine)
- NTA Names (Dutch Royal Library)
- RVM (Répertoire de vedettes-matière)
OCLC cataloging application comparison

Create new WorldCat records one at a time for print and electronic items to make your library’s rare and distinctive items discoverable. Save time by enriching and sharing existing records, setting and deleting your library’s holdings, and exporting WorldCat records for local use. Choose the service that best meets the needs of your unique library.

### Record editing and creation

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<th>Connection browser</th>
<th>Connection browser</th>
<th>Connection client</th>
<th>WorldShare Record Manager</th>
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<td>No</td>
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<tr>
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<td>Yes</td>
<td>No</td>
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**Learn more at oc.lc/catcompchart**
OCLC Cataloging Updates

Metadata Quality staff
OCLC Metadata Quality
Recent updates

• Recent Installations and Releases
  • WorldCat Validation Installation, April 2021
  • WorldShare Record Manager Release, May 2021
  • Other Recent OCLC Product Releases

• Member Merge Project Report

• REALM Project
Macros are useful for automating repeated actions/changes

One area where that applies is obsolete LC subject headings

Obsolete LC subject headings arrive in WorldCat when loading bibliographic records (e.g., “—Addresses, essays, lectures”)

OCLC Metadata Quality maintains a spreadsheet of searches to periodically retrieve and fix problematic records

One area of interest are invalid, potentially offensive headings
Connexion Client Macros and LCSH

• Periodic searching ensures that we have eliminated offensive terms that are no longer part of LCSH

• Some headings automatically convert as part of global controlling based on 4xx cross-references, e.g.,

   650 _0 Gypsies $z Germany > 650 _0 Romanies $z Germany

• Other headings need some manual correction due to coding and/or typographical errors, e.g.,

   651 _0 Handicapped > 650 _0 People with disabilities
Connexion Client Macros and LCSH

• Some headings do not exist as 4xx cross-references, e.g.,
  650 _0 Jewish question > 650 _0 Jews

• Some headings do not exist as 4xx cross-references and are deleted, e.g.,
  650 _0 Yellow peril > [deleted]

• Some headings are so incorrectly constructed that they require special
  manual effort to repair them—there are backlogs of some of these
Update on Encoding Levels

• Goal is to eliminate:
  • All non-standard MARC21 codes
  • Redundancy
  • Loss of encoding level information

• Began conversion of 26M encoding level K records in January 2021
  • Using criteria to determine whether records should be changed to blank, 7, or 3.

• Converted about 7M as of June 1
# Virtual AskQC Office Hours

Join OCLC Metadata staff to discuss WorldCat quality issues and cataloging questions.

## Time and call-in information for AskQC office hours

<table>
<thead>
<tr>
<th>Topic</th>
<th>Day/time (eastern)</th>
<th>Toll-free call-in number</th>
<th>Registration link</th>
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<tbody>
<tr>
<td>All things authorities</td>
<td>Tuesday, May 11, 2021 at 9:00 AM Eastern, Thursday, May 20, 2021 at 4:00 PM Eastern</td>
<td>US/Canada: 1-877-663-4490 UK: 0800-2046117</td>
<td>May 11 registration, May 20 registration</td>
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<td>Evolution of a WorldCat record</td>
<td>Tuesday, June 8, 2021 at 9:00 AM Eastern, Thursday, June 17, 2021 at 4:00 PM Eastern</td>
<td>US/Canada: 1-877-663-4490 UK: 0800-2046117</td>
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### May 2021 - All things authorities

- WebEx recording: May 11
- WebEx recording: May 20
- Presentation slides
- Summary and member questions

### Previous AskQC office hours

Find past AskQC office hour recordings and supporting materials.

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Cataloging questions: [askqc@oclc.org](mailto:askqc@oclc.org)

Session links available at: [oc.lc/askqc](https://oc.lc/askqc)
David Whitehair
whitehad@oclc.org

Submit questions in Chat.
Send chat to “Everyone”

AskQC@oclc.org
Nathan B. Putnam
Director, Metadata Quality

Closing
Thank you
Final notes...

Recordings/slides/notes

• Watch your email
  • WebEx email
  • Listservs

• Linked on the Community Center
  • Cataloging and Metadata
  • Record Manager
  • Collection Manager

• Linked on the AskQC help site
Final notes...

Recordings/slides/notes

• Watch your email
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• Linked on the Community Center
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The conversation continues...

• Cataloging policy
  • Email AskQC@oclc.org
  • AskQC twice monthly webinars
• News, discussions, and more...
  • Cataloging and Metadata community
  • Record Manager community
  • Collection Manager community
Thank You!

Please send questions and comments to AskQC@oclc.org