

# Notes from the OCLC Cataloging Community Meeting on 3 June 2022

Access the recordings and presentation slides

## Session: OCLC Cataloging Update

### Presenters

- David Whitehair, Director, Metadata Services
- Denise Sandell, Electronic Resources and Collections Librarian (Wilson College)
- Anne Washington, Product Analyst, Metadata Services
- Cindi Blyberg, Senior Product Manager, Metadata Services

### Presentation summary

David Whitehair began the session by introducing Gina Winkler, the new Executive Director of Metadata and Digital Services. He then proceeded to the Connexion update. OCLC released Connexion Client 3.0 almost a year ago. This new version decommissioned obsolete features and improved security, and is compatible with Windows 10. The next release, 3.1, is currently in field testing, and will address additional bugs. Its expected release is either in June or July 2022. Users of 3.0 will be required to upgrade to 3.1, but users of 2.63 may either jump directly to 3.1 or continue using 2.63. There is currently no planned end of 2.63 support. These changes only affect the desktop application Connexion Client; there have been no changes to the web-based Connexion Browser.

Denise Sandell gave a presentation on the WorldCat holdings update. The streamlined holdings update is a new program included with the cataloging subscription that updates a library's holdings in WorldCat. The process consists of submitting the request, setting up collection information, submitting MARC21 catalog data, and finally, a brief survey. Communication throughout the process was excellent, and specialists were assigned to make each step as easy as possible. Deadlines were helpful for keeping the project going efficiently. There was plenty of assistance and opportunities for feedback throughout. In short, this new program is very easy to do. It is also permanently available, included with a cataloging subscription.

David Whitehair then spoke about web visibility. This service benefits from up-to-date WorldCat holdings. Libraries reach only a small percentage of potential users through their own websites and communications; OCLC's web visibility program makes it easier to connect with potential users online. Whenever your holdings are represented in WorldCat through any cataloging subscription and you maintain a WorldCat FirstSearch Discovery subscription, your library's resources are available in the web visibility program. Two recent initiatives benefit from up-to-date holdings: direct links to your library from Google Search, and improvements to worldcat.org. WorldCat is the foundation of our web visibility program. A new WorldCat site will go live later this year with accessibility improvements, mobile access, and search optimization.

Anne Washington went over developments in WorldCat Entities and Linked Data. For over a decade, OCLC has been working on linked data initiatives and learning from our partners about what is needed to do library linked data at scale. With the support of the Mellon Foundation and advisory group members, we have released 150 million WorldCat entities, containing descriptions of creative works and persons, forming the foundation of our shared entity management infrastructure. This is a shared entity management infrastructure to support linked data initiatives in the library community. She then gave a demo of the new entities.oclc.org and how entities can be searched and displayed. This is the initial foundation of our shared management structure, and we're now partnering with libraries to refine and enhance a linked data management tool called OCLC Meridian. We are also working on APIs to give libraries what they need to fully incorporate linked data into their workflows.

Cyndi Blyberg was unable to present, so David Whitehair covered her update on WorldShare Collection Manager. OCLC recently completed a project to match WorldCat knowledge base titles to WorldCat bibliographic records, resulting in an additional 3.5 million OCLC numbers assigned to these titles, which can now be used to manage holdings and receive WorldCat MARC records. Other initiatives are underway assigning OCLC control numbers to KB titles. A new feature is coming to Collection Manager: the language of cataloging setting will allow you to set your preferred language of cataloging for WorldCat knowledge base collections, for managing holdings in WorldCat and for MARC record delivery. Members can easily automate management of their electronic holdings through OCLC's vendor partnerships, and new partners are coming soon, including Sage, Oxford University Press, Cambridge University Press and Assessment, and IEEE.

## URLs mentioned during the event

- Request a streamlined WorldCat holdings update project: <http://oc.lc/holdings-request>
- OCLC Web Visibility: <http://oc.lc/visibility>
- Automated e-holdings management: <http://oc.lc/autoload>
- WorldCat Entities: <http://entities.oclc.org>
- Information on OCLC cataloged collections: [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Use\\_Collection\\_Manager\\_for\\_content\\_from\\_a\\_specific\\_provider/OCLC\\_cataloged\\_collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Use_Collection_Manager_for_content_from_a_specific_provider/OCLC_cataloged_collections)

## Audience questions

### **When will Connexion 3.1 be available?**

It will be out in late June or early July 2022.

### **Do the bug fixes in 3.1 include resolving macro and window issues?**

We will list more specifics as we release that version, so you can see exactly what has been fixed.

### **For Denise, How did you deal with special collections that should not appear with holdings in OCLC?**

I did go through and did a quick cleanup of the records before I sent those out. When I exported the MARC records, I specified exactly what I wanted. You send the collection, exactly what you want to register in WorldCat, and OCLC does the comparison to WorldCat.

**I missed what this process is called "No charge" what?**

It is the Streamlined WorldCat Holdings Update.

**You said this is free. How is this different than a reclamation project which (I believe) is not free?**

The reclamation project is a more extensive project to where in addition to adding new records to WorldCat, it also enriches existing records; it also manages local holdings records and provides more support and work with a specialist. So it is a bit more involved, whereas this is a simplified, easy process.

**Denise, what happened to your local holding record (LHR) for serials? Did you have to update all of those manually?**

No, our cataloger was pretty much able to update as needed.

**What kind of reports are provided for WorldCat Holdings Update?**

One of the collection types that you can use with Collection Manager is you can set up a profile to receive WorldCat records that have your holdings on that get enriched by the community or by other processes, and you can do that by different criteria. What you can get is a report that will tell you any record that is delivered to you and then the reason that triggered the delivery.

**How many personal name entities are in OCLC but not VIAF?**

None. As of right now, all of the person entities that you see will be VIAF. The persons were created from that cluster data.

**Does OCLC have any plans to populate the entity URIs into WorldCat data?**

We're exploring the different ways we can use our entity data. With the launch, we now have all these permanent URIs, so we are looking at different ways to use them. We will keep everyone informed of developments.

**If an institution uses both Record Manager and Connexion to catalogue, are the stats synchronized to reflect both system's statistics? Or do we have to derive stats separately from both systems?**

There are two separate sets of stats for right now, so you could go out to our stats portal and that's where you get Connexion stats, which can be emailed to you. And then the Record Manager stats are available in the Record Manager user interface. Analytics I believe is what the tab is called.

**Is O'Reilly coming? Please?**

OCLC does cataloging for O'Reilly and the records are available to O'Reilly customers. You can order the MARC records and manage the holdings for O'Reilly via a different process. See

[https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Use\\_Collection\\_Manager\\_for\\_content\\_from\\_a\\_specific\\_provider/OCLC\\_cataloged\\_collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Use_Collection_Manager_for_content_from_a_specific_provider/OCLC_cataloged_collections).

**Several people asked about what determines appearing or not appearing in WorldCat?**

As I mentioned, the visibility in WorldCat.org is based on FirstSearch and Discovery subscription.

**I've run into entities that appear to be duplicates. How do we report them when found?**

When we have moved through the partner phase and are ready to have folks work in OCLC Meridian, we will have features for reporting duplicates. In the meantime, you can send questions or comments on the WorldCat Entities, or duplicate reports, it's [linkeddata@oclc.org](mailto:linkeddata@oclc.org) .

**If the streamlined update process is now a permanent service, can libraries do this once a year or so to update our holdings?**

Yes, we are working on additional information about the process and how it compares with other offers. In some cases, a library might use the streamlined process to update their holdings one time and then retain their holdings going forward either using Connexion or Record Manager or Data Sync, etc., ongoing. In other cases, some libraries would prefer to regularly send in the full catalog and have it compared.

**Someone mentioned that we can now delete our own records on Record manager if there were no holdings attached. Is this new? How is this done?**

If you entered the record into WorldCat and there are no other holdings on the record, you can delete it instead of sending it to OCLC. Anyone with a cataloging subscription can get Record Manager, even if you do most of your work in Connexion, and can take advantage of features that are in Record Manager and not in Connexion.

**Who is the best person to contact to review our Library account logins etc.?**

We highly recommend you review your authorizations to clean them up, and we give you two choices. You can go to [orders@oclc.org](mailto:orders@oclc.org) or go to our Support like you would with any other customer support questions, and they will work with you to supply a list of your authorizations.

**The ability to choose language of cataloging is intriguing. Are there any plans to provide more control over which subject thesauri are included in records? It would be nice to be able to filter out particular thesauri we don't use, since most ILS (or at least the ones I'm familiar with) don't have the ability to exclude 6xx on the basis of \$2. Could field export options use \$2 rather than just tags?**

We are considering this as a future enhancement.

**Can these entities URI go into MARC records that have that specific authorized form?**

WorldCat Entity URIs can be added to any applicable MARC field in \$1.

**Are you considering adding a code for the entities URIs with LC so we can add them to authority records (cf. <https://www.loc.gov/standards/sourcelist/standard-identifier.html>)?**

We will be looking into this.