

Using Connexion macros to automate workflows

Presentation summary

Casey Mullin from Western Washington University presented on learning the basics of OML and writing your own macros. Casey provided an outline for his crash course in OML showing the various resources used, such as Joel Hahn's tutorial "[OML for the Complete Beginner](#)" and [OCLC's Basics: Use Macros](#), and examples of macro code.

Connexion update

Presentation summary

David Whitehair from OCLC presented on updates for Connexion. A new Connexion client is coming soon! The new version will be updated to work better with Windows 10 and conforms to new security standards. It will also include updated online documentation, removes updated obsolete functionality (e.g., GLIMIR options, Institution Records, and more), and automatically converts macros to 64-bit compatibility. It is yet to be decided what other bug fixes will be included and updates will be provided as to what will be included closer to the release. As in the past, an early adopter field test is planned for May/June 2021. Libraries that participated in the past early adopter field test will be contacted but also looking for additional libraries who use the following functionality: network-shared local files, macros, label printing, and CJK e-dictionary. The expected release is scheduled for July/August of 2021. Time will be given for libraries to upgrade, and support for older versions will be discontinued in 2022 with a minimum of 3 months advance notice. More information will be provided as the time gets closer.

David spoke about changes coming to the Message of the Day in the next couple of months. The message, as it currently stands, will go away and be replaced by a static Welcome Message. News posts from Cataloging and Metadata community will be used for ongoing announcements in its place.

David also suggests that if you are a Connexion browser user, to look at [WorldShare Record Manager](#), as it might better meet your needs. An upcoming virtual meeting will include various Record Manager libraries that will share the difference of what they're doing using Record Manager instead of Connexion browser. Connexion browser, WorldShare Record Manager, and Connexion client all use the same online save file making it very easy to move records between the three systems, but Record Manager might provide more functionality. More information on the virtual meeting will be coming soon.

Member Questions

Question: Can macros be created for Record Manager?

Answer: No, macros are not supported within Record Manager. There is a built-in core functionality that does similar things for which people were creating macros for.

Question: I use the Connexion website, does that affect its use? (Interpretation: Can you use macros in the Connexion browser?)

Answer: The Connexion browser and WorldShare Record Manager do not support macros. They are only in the Windows-based Connexion client.

Question: Aren't Institution Records a legacy feature from RLN?

Answer: They were, and they were added into Connexion client, and then they were discontinued. That is why they will be removed from the Connexion client interface.

Question: Will the messages (presumably Message of the Day) be available via RSS?

Answer: No.

Question: Possibly premature, but is there a roadmap for future Connexion development?

Answer: Not at this time. Currently focused on changes mentioned during the presentation, and those changes will be announced upon release.

Question: Who should we contact at OCLC for help with OCLC Macro creation?

Answer: Please contact [OCLC Support](#) for help troubleshooting OCLC macro creation issues. In addition, see additional [Connexion client macro resources](#) on the OCLC web site.

Question: Any update to OML itself in Connexion 3.0?

Answer: No updates are planned for the OCLC Macro Language with Connexion 3.0.

Question: Will Connexion client macro be [upgraded] to use with Record Manager as API tool?

Answer: Record Manager will not integrate the Connexion client macro functionality. Instead, many features have been incorporated into Record Manager to help with cataloging process, such as Create 830, Enhance 505, Generate 043, and more available from the Advanced Action menu.

Question: Will import profiles using the OCLC Gateway be affected in any way? We export from OCLC into Alma.

Answer: Connexion client 3.0 will not impact OCLC Gateway export. This functionality will continue to work as it does with the current versions of Connexion client.

Question: Will/can the updated Connexion client allow an option for \$0 URIs to be exported for controlled name and subject headings (as is possible with Record Manager)?

Answer: The advanced functionality for exporting \$0 URIs will not be added to Connexion client 3.0 at this time. You can export that data using Record Manager or Collection Manager.

Question: Will new Connexion client 3.0 provide access to LHRs?

Answer: Access to Local Holdings Records (LHRs) will not be added to Connexion client 3.0. You can continue to manage LHRs using Connexion browser or Record Manager, or you can load them from your local system via a Data Sync collection within Collection Manager.

Question: What is the authority module in the new Connexion?

Answer: There are no changes to the authority functionality in the new version of the Connexion client. You can continue to use the same authority functionality currently supported in Connexion client.

Question: Will there be a Mac version of the Connexion client?

Answer: OCLC does not plan to offer a Mac version of Connexion client. See "[How to run Connexion client on a Mac](#)" for information on running the Windows version of Connexion client on a Mac.

Question: Are records on Connexion purged at some point? Did control number searches and the records weren't available anymore. Don't records stay in the database?

Answer: There are three cases when a record is removed from the WorldCat: 1. records merged, 2. older vendor records for items that were never published, and 3. requests from institutions. In case 1, a duplicate record that will be subsumed by another record will be deleted, but the control number of the deleted record will be added to field 019 in the retained record. Control numbers in field 019 are included in a control number search. In cases 2 & 3, the records are deleted from WorldCat and the control number can no longer be searched. The resource itself no longer exists (e.g. a thesis that was withdrawn by a university) or the resource never existed (e.g. an item that was supposed to be published but was not). More information about deleting records can be found in Bibliographic Formats and Standards section, [5.5 Requesting Changes to Records](#).

Question: I am attending ALA Midwinter's virtual conference starting next weekend. Will you be a part of a session/roundtable during the conference?

Answer: Cynthia Whitacre will be speaking on our Cyrillic script project during the [ACRL Technical Services Interest Group Forum](#). Nathan Putnam will be speaking at the Library of Congress BIBFRAME Update Forum on OCLC's work with BIBFRAME (see cataloging listservs for the announcement). He will also be speaking at the CORE Linked Data interest group meeting titled Troubleshooting Linked Data Authority Records during the [CORE Interest Group Week in early February](#). And finally, the linked data round table that is usually held during the Midwinter Meeting, will be held virtual in March. More details about this soon.

OCLC and Linked Data

Presentation summary

John Chapman, Senior Product Manager, shared updates on current linked data initiatives at OCLC.

On March 2, 2021 we will be holding the event "[OCLC and Linked Data—the transition to contextual metadata](#)". The event will cover the progress with the [Shared Entity Management Infrastructure Project](#) as well as include a [report](#) on the conclusions of the [CONTENTdm Linked Data Project](#).

The session is a replacement for the usual ALA session on Linked Data and modelled in a similar manner that included a roundtable of presenters with time left for Q&A.

Watch for announcements soon on registration information.

OCLC Cataloging Update

Presentation summary

OCLC Metadata Quality staff shared OCLC news and updates as well as answered questions related to the topics.

Jay Weitz, Senior Consulting Database Specialist, gave updates on the following topics:

The upcoming MARC validation installation is currently scheduled for late February. The update includes MARC 21 Bibliographic, Authority, and Holdings Update No. 31 (Dec. 2020), MARC codes from four LC Technical Notices (Oct.-Dec. 2020) and several bug fixes. Details are included in the February 2021 [WorldCat Validation Release Notes](#).

The REALM project (**R**eopening **A**rchives, **L**ibraries, and **M**useums research project) is a research project conducted by OCLC, Battelle Institute, and The Institute of Museum and Library Services to produce science-based information focusing on material handling to mitigate COVID-19 exposure in archives, libraries, and museums. Latest news and research can be found at [REALM Project](#).

The Member Merge Project currently has 53 participating institutions who have been trained to merged duplicate records in WorldCat. Since the beginning of the project, institutions have merged over 66,000 sets of duplicates. Those interested in joining the project must be a PCC participant and can express interest by sending an email to askQC@oclc.org.

Virtual ASKQC Office Hours are held twice a month. OCLC Metadata Quality staff present monthly on cataloging topics which is followed by a Q&A session. Recordings, slides, Q&A from past sessions, and registration for future sessions can be found at oclc.org/askQC.

The OCLC annual report for 2019-2020 is now available at <https://www.oclc.org/en/annual-report/2020/home.html>.

Robert Bremer, Senior Consulting Database Specialist, gave an update on the project to eliminate OCLC defined encoding level codes I, J, K, and M in favor of MARC 21 codes. OCLC will begin to convert records with Encoding level K in January 2021 using a Connexion Client macro. The macro evaluates the content of the record to determine the appropriate encoding level. For more information on this effort, you can review the Virtual ASKQC Office Hours session on the topic held in June 2020.

Charlene Morrison, Database Specialist II, shared information on updates to Bibliographic Formats and Standards which included revisions to Chapter 5.2, field 042, field 045, and new field 688 among many others.

Bryan Baldus, Consulting Database Specialist, provided an overview of the following Authority-related updates:

Derive authority record functionality within WorldShare Record Manager has been completed. Users may now derive family names, corporate names, geographic names, uniform titles, and series from a bibliographical record.

Add equivalent subject headings to a bibliographic record is now available based on several different thesauri.

The Biblioteca Nacional de España (BNE) authority file is now available within WorldShare Record Manager.

Robin Six, Database Specialist II, gave an update on OCLC statistics including Member Merge activity, WorldCat community enrichments, OCLC Duplicate Detection and Resolution (DDR), and OCLC Metadata Quality activity.

Member Questions

Question: If we contribute to a NACO funnel, are we able to join the member merge project?

As a member of a NACO funnel, you are considered a PCC participant, so yes you are eligible to participate in the Member Merge project.

Question: What criteria are being used in the decision to move a record from Encoding level K to blank (for full)?

Minimal level is met if the basic descriptive elements are there, i.e title, publisher, date, and extent. Full level is met if there is more information beyond that, such as additional title information, size, and subject headings.

Question: What does enrichment replacement mean?

Non-PCC catalogers with replace capabilities can enrich Program for Cooperative Cataloging (PCC) BIBCO records in WorldCat, except CONSER records, by adding or editing certain fields in a bibliographic record. For more information, see [section 5.2.3, Editing capabilities for PCC records](#) in Bibliographic Formats and Standards.

Question: When we send bibchange an email about duplicate records, who reviews it? OCLC, or do you send it out to an MMP member?

It could be either. Often duplicates that are reported to OCLC for merging are provided to our Member Merge libraries who are under review and use the sets for practice, or have gained independence and have the bandwidth to do additional merging beyond what they encounter in their daily work.

Questions: How do I find or validate the BNE headings in Connexion? What tag and indicator needs to be used to validate BNE headings?

In Connexion, only LCNAF, LCSH, and LCAC authorities are available for search and browse, controlling, and validation. Other authority files are only available in WorldShare Record Manager.

In bibliographic records, BNE headings are coded with 2nd indicator 7 and \$2 *embne* for tags 600, 610, 611, 630, 650, and 651. For field 655, they use 2nd indicator 7 plus \$2 *tgfbne*. In addition, a special case has been made for \$2 *embucm*--any subject headings with that \$2 value that match to a BNE heading will control to BNE, and \$2 will flip to *embne* or *tgfbne*, depending on the tag.

For descriptive headings, if 040\$b (language of cataloging) is "spa", then controllable 1XX, 7XX, and 8XX tags may be individually controlled to BNE. When using control-all, subject and genre/form headings will control, where appropriate, when the 2nd indicator 7 and above-mentioned \$2 codes are present; descriptive headings will only control to BNE if 040\$b is *spa* and 040\$c contains one of the following OCLC symbols:

BNM

S9M

ESAEC

ESICL

ESUCM

ESEHU

IE@

In addition, for records with 040\$b *spa*, if a descriptive heading contains \$2, then the heading can only be controlled to BNE if \$2 is "embne" or "embucm". When \$2 is present, if the heading is controlled to BNE, then \$2 will be removed when controlling is added. If the heading can't be controlled, then \$2 remains as-is.