Notes from the OCLC Cataloging Community Meeting on 28 January 2022

[Access the recordings and presentation slides](#)

Session: OCLC Cataloging Update

Presentation summary

David Whitehair, Director, OCLC Metadata Services, presented updates for Metadata Services. OCLC has announced a new simplified process to help libraries update their WorldCat® holdings. The streamlined process will help libraries update their WorldCat holdings to maximize visibility on OCLC services such as Connexion®, WorldShare® Interlibrary Loan, FirstSearch®, and WorldCat.org™.

The new streamlined process is available to all libraries with a cataloging subscription at no additional charge. Libraries can send their full MARC catalog data to OCLC, and the process will match the library's records with WorldCat, add holdings to matching WorldCat records, remove inaccurate WorldCat holdings, and add new records when a matching WorldCat record is not found (optional).

This process will run for the next several months. Libraries who are interested need to request a streamlined holdings update by 31 May 2022.

Hundreds of libraries have already signed up, and OCLC is excited about taking this opportunity to help all libraries get their holdings up to date in WorldCat.

Those interested in this process can find additional information and fill out a request form at https://oc.lc/holdings-request.

Audience questions

How is the streamlined holdings process different from the reclamation process? What is the information that the library gets back?

The [streamlined WorldCat holdings update](#) project offers a simpler process with significantly less consultation with OCLC staff. You send your data, we match and load new records for what we can't match. If we match to a record in WorldCat, we are setting the holding on the record, but we are not enriching it with additional data from your system. By contrast, the full reclamation process also takes the comparison of the two records but also enriches the record. This is very straightforward—get the holdings in and out. The data you get back is very similar; you do get the OCLC control number back in the record you sent or in a report, so that you are embedding that into the local catalog.

The online form for the streamlined holdings update indicates that the deadline for submitting requests is 31 May and that data must be supplied within two weeks of submission. If a library submits a request for a streamlined holding update project today must they be ready to submit their data within two weeks or is that only true if a library waits until the end of May to make the request?

Requests should be submitted by the end of May, and we ask that the data be sent within two weeks of submitting the form.

Will people get reports of holdings being changed during the streamlined process?

You do get a report back that provides your local system number along with the record that we matched to and if we set a holding or we already found a holding. We don't give back a report that says the holdings that were deleted because these are items that you no longer have in your catalog. If it's in the 019 field, we can match to that and return either of the fields back to you in the report.

What's the end-of-life date for the older version of Connexion client?

We haven't set an end-of-life date yet but will be setting that date probably in the next couple of months. We are still monitoring how libraries are shifting over to the newer version of Connexion client. We would like to hear from you if there is a reason that you haven't been able to shift to the Connexion client 3.0.

WorldShare Record Manager

Presentation summary

John Chapman, Senior Product Manager, OCLC Metadata Services, presented on updates for WorldShare Record Manager. Record Manager is a browser-based piece of software, with a modern interface, that requires no software to load and shares the same online save file that Connexion uses. It has access to more authority files than Connexion does, and has support for BIBCO, CONSER, and NACO workflows. WorldShare Record Manager also supports agent functionality workflow for libraries that have an agreement to do work on behalf of other libraries. It also includes a feature set of labels, called My Labels, which has powerful customization options, and multiple options for formatting search results. Record Manager also offers a text view editor for simplified editing. Improvements have been made in support for non-Latin characters, both in editing and in labels, in managing shared print commitments within local holdings records (LHRs) and visibility of LHRs across groups and other libraries.

John also presented a [video](#) created by Petra Löffel, Product Analyst, OCLC Metadata Services, showing a brief demonstration of using WorldShare Record Manager.

WorldShare Record Manager is currently available by request to anybody with a cataloging subscription, and a [request form](#) is available online.

Audience questions

Does Record Manager have the cataloging macros? I currently use Connexion, should I use Record Manager instead?

Libraries and staff members who are currently using Connexion browser can often make an easy transition to Record Manager because the paradigm is similar. WorldCat Record Manager's feature set overlaps significantly with Connexion client, but there are things that each does that the other doesn't. We do not offer user-created macros within Record Manager; we have, however, implemented some of

the most commonly used tasks in the "Advanced Actions" features. We've also built out additional features that work across many records at a time. We continue to attempt to narrow that gap around macro functionality, but otherwise think you will be pleased to see that there's a lot of functionality that's going beyond what we have in the client. For more information on what features are available in which application, see this chart.

WorldShare Collection Manager

Presentation summary

Cindi Blyberg, Senior Product Manager, OCLC Metadata Services, presented highlights on the updated Collection Manager roadmap, which can also be found on the OCLC Community Center in the Collection Manager community. WorldCat holdings management and MARC record output will benefit from additional OCLC WorldCat record number matches in the WorldCat knowledge base, so additional coverage of the library's electronic titles will be delivered in their MARC records. We will also add features that will improve search results filtering. Later this calendar year, local data may be automatically moved to a new record when holdings are updated, due to an OCLC number change in the WorldCat knowledge base. Libraries will also be able to specify the preferred language of cataloging for knowledge base collections, which will mean that MARC records in the preferred language of cataloging will be delivered where they exist in WorldCat. Bulk change functionality will be added so that collection settings can be changed for more than one collection at a time. Libraries will be able to receive all titles, or only those cataloged by OCLC catalogers, for OCLC cataloged collections, and automatic holdings feeds for Sage collections will be coming this year.

Automatic holdings feeds: Set it and forget it

Presentation summary

Marci Burton, Electronic Resources Cataloging Technician, University of North Carolina at Greensboro, presented on OCLC's automatic holdings feeds. Because of relationships with some of the biggest vendors in academic publishing, OCLC contacts the provider and automatically adds and maintains the library's WorldCat knowledge base collection data. She highlighted which of the providers/vendors the University of North Carolina at Greensboro chose, and which ones they decided against, and she provided the reasoning behind those decisions. With examples from Elsevier ScienceDirect and ProQuest Ebook Central, Marci provided information about the timing of the initial load and for titles to become available. Automatic holdings feeds are available to anyone with a cataloging subscription. Collection Manager has added many partners over the years with more to come. Any questions about the process can be sent to OCLC Support at support@oclc.org.