OCLC cataloging community meeting

3 FEBRUARY 2023
Welcome back
Today’s schedule

First session

• Welcome
• Diversity, equity, inclusion
  – Patricia Harpring (Getty)
  – Sara Levinson (UNCCH)
  – Pamela Louderback (NSU)
• Short break

Second session

• OCLC cataloging update
  – David Whitehair
  – Erik Mayer
  – TJ Kao (UC Davis)
  – Lisa Olsen
  – Diana Reid (U Louisville)
• OCLC Data Quality update
• Closing
OCLC cataloging update

DAVID WHITEHAIR
Director, Metadata & Digital Services
Session Moderator

- Erik Mayer
- TJ Kao (UC Davis)
- Lisa Olsen
- Diana Reid (U Louisville)
WorldShare Record Manager
Erik Mayer
Product Analyst, Metadata & Digital Services
WorldShare® Record Manager

- A modern, user-friendly interface, accessible by web browser
- Available to all Cataloging subscribers, including WMS libraries
- MARC 21 editor and Text View editor to create new or enrich existing records in WorldCat
- A saved in-progress file that is shared with the Connexion save file
- Integrated management of staff users and permissions
- And more…
**Improved full search results with filtering/faceting – enhanced view**

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Edition</th>
<th>Format</th>
<th>Publisher</th>
<th>ISBN</th>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frogs</td>
<td>Marilyn Starn</td>
<td>Print book</td>
<td>English</td>
<td>Minneapolis, MN : Amicus/Apache Ink</td>
<td>9781615109100 (library binding)</td>
<td>10 holdings</td>
</tr>
<tr>
<td>Frogs</td>
<td>Amy McDonald</td>
<td>Print book</td>
<td>English</td>
<td>Minneapolis, MN : Belwether Media</td>
<td>97815615429</td>
<td>10 holdings</td>
</tr>
</tbody>
</table>
Support for numerous authority files and controlled headings

WorldShare Record Manager

Edit BNE: Literatura española

Print  Edit  Record  Copy Authority Data  Save

Search

Data Type: Authority Records

Scope

LC  ART - Browse  BNE  CN  Mexican Authorities

Search Results:

016  BNE19900985518

024  7  http://id.loc.gov/authorities/subjects/sh85126126 $2 lcsh

024  7  http://lemac.sgcbr.mcu.es/Autoridades/LEMAC201232435/concept $2 lemac

024  7  http://lemac.sgcbr.mcu.es/Autoridades/LEMAC201228096/concept $2 lemac

024  7  http://lemag.sgcbr.mcu.es/Autoridades/LEMA201302863/concept $2 lemag

024  7  http://lemau.sgcbr.mcu.es/Autoridades/LEMA201509514/concept $2 lemau

040  6  SpMaBN $a sp $a SpMaBN $e rdc $e ombrév

042  199698261012PCMBPC BNEP3906

Edit 1025699422

Print  Edit  Record  Advanced Action  Save

Search Results:

650  7  Literatura española $x Lecigraphy $x Tesis inéditas $x En línea $x ombrév

700  1  Carvajal, María de la C. $d dir.

710  2  Universidad Complutense de Madrid $d Facultad de Filología $d Departamento de Lengua Española y Teoría de la Literatura y Literatura Comparada

805  4  1  http://reprints.ucm.es/10383/1/7338680.pdf $z Texto completo de la tesis
TJ Kao
Head of Metadata Creation
University of California, Davis
Nonnative speaker required: WorldShare Record Manager makes adding quality non-English subject headings easy

TJ Kao
Head of Metadata Creation
UC Davis
tkao@ucdavis.edu
Requirements:

- High quality
  - Created by authoritative entities
  - Active and ongoing maintenance
  - Comprehensiveness
  - Authority “controllable” in both WorldCat and local ILS (Alma)
- Linked data compliance
- Easy to use
  - Enhanced search functionality
  - Ideally, mapping from Library of Congress Subject Headings and FAST
Comparison of commonly used sources of Spanish language subject headings

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Sources</th>
<th>lcsh-es.org</th>
<th>BNE (Biblioteca Nacional de España) Autoridades</th>
<th>WorldShare Record Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created by authoritative entities</td>
<td>Yes and no</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Active and ongoing maintenance</td>
<td>No</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Comprehensiveness</td>
<td>No</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Authority “controllable” in both WorldCat and local ILS (Alma)</td>
<td>N/A</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Linked data compliance</td>
<td>No</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Enhanced search functionality</td>
<td>No</td>
<td>No</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Ideally, mapping from Library of Congress Subject Headings and FAST</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>
What WorldShare Record Manager offers #1

Availability of numerous authority record sources
What WorldShare Record Manager offers #2

Customizable search scopes
What WorldShare Record Manager offers #3

Availability of both keyword and browse search functionalities
What WorldShare Record Manager offers #4

Availability of multiple search indexes
What WorldShare Record Manager offers #5

Possibility of locating BNE headings by searching equivalent LCSH
What WorldShare Record Manager offers #6

Easiness of identification
What WorldShare Record Manager offers #7

Allowance for controlling headings and embedding URIs
My personal wish list

#1. Add BNE to the “Add equivalent subject headings” list

#2. Add BNE headings to WorldCat records automatically when equivalent LCSHs are available

#3. More search and browse indexes, such as “Linked Entry: Genre/Form” and “Linking Entry: Uniform Title”

#4. Make BNE controllable or make controlled BNE headings through WorldShare Record Manager more “understandable” in OCLC Connexion
OCLC documentation on working with authority records in WorldShare Record Manager:

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Authority_records/Work_with_authority_records

OCLC documentation on BNE authorities:

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Authority_records/Work_with_authority_records/BNE_Authorities

OCLC documentation on control headings:

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Bibliographic_records/MARC_21_view/Control_headings#Add_equivalent_subject_headings
Thank you!

TJ Kao
tjkao@ucdavis.edu
Erik Mayer
Product Analyst, Metadata & Digital Services
Authorities

Art & Architecture Thesaurus (AAT)
The Getty Research Institute

Biblioteca Nacional de España (BNE) Authority File
Biblioteca Nacional de España (National Library of Spain)

Canadiana (Autorités de noms Canadienne en français)
Bibliothèque et Archives Canada (Library and Archives Canada)

Canadian Subject Headings (CSH)
Bibliothèque et Archives Canada (Library and Archives Canada)

Faceted Application of Subject Terminology (FAST)
OCLC – coming soon!

Integrated Authority File (GND)
Deutsche Nationalbibliothek (German National Library)

LC/NACO Name Authority File (LCNAF) & Library of Congress Subject Headings (LCSH)
Library of Congress

Māori Subject Headings File
Ngā Upoko Tukutuku

Medical Subject Headings (MeSH)
U.S. National Library of Medicine

Nederlandse Thesaurus van Auteursnamen (NTA Names)
Koninklijke Bibliotheek (National Library of the Netherlands)

Répertoire de vedettes-matière (RVM)
Université Laval
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

<table>
<thead>
<tr>
<th>Feature</th>
<th>Connexion browser</th>
<th>Connexion browser (Express tab)</th>
<th>Connexion client</th>
<th>WorldShare Record Manager</th>
<th>239.50 Cataloging</th>
<th>WorldCat Metadata API</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit records in MARC tag view (such as &quot;600&quot;)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Edit records in MARC item view (such as &quot;Date&quot;)</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Edit bibliographic records in bibliographic view</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Learn more at [oc.lc/catcompchart](http://oc.lc/catcompchart)
Create new, original records in WorldCat

Integrate authority files to facilitate research

Enrich bibliographic data quickly and easily

Additional Resources

- To help you get started, please visit https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Training

- Share your experiences in the Record Manager community https://www.oclc.org/community/record_manager.en.html

Learn more at oc.lc/getRM
WorldShare Collection Manager
Lisa Olsen
Product Analyst, Metadata & Digital Services
• Provides access to the WorldCat knowledge base to simplify and automate your electronic workflows
• Automatically maintains WorldCat holdings
• Improves the quality of your catalog with optional WorldCat MARC record delivery
• Makes your e-resources easier to find in WorldCat.org and Google Scholar
• Available to all Cataloging subscribers, including WMS libraries
WorldCat knowledge base

Over 23,000 collections representing 65 million items from nearly 700 providers

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

For a complete list, visit oc.lc/kbcollections
Automate your holdings management

For more information, visit oc.lc/autoload

Future partners:
Diana Reid
Electronic Resources and Discovery Librarian / Assistant Professor
University of Louisville
Google Scholar in the WorldCat knowledge base

A low effort, high-impact tool to connect patrons using Google to your library resources

Diana Reid
University of Louisville
University of Louisville  
(data from Fall 2021)

Student body
- 23,194 enrolled (FTE 18,397)
- 35% URM
- 2,626 in online programs

First-year students
- 31% enrolled full-time are 1st generation
- 68% lived on campus

- Carnegie 1 classification (doctoral universities – very high research activity)
- University Libraries comprised of Ekstrom Library (main camps), Kornhauser (health Sciences), Law, Music and Art

WMS and Discovery customer since 2015
- Longer-term users of Google Scholar for resource discovery
Everything you need (and more) in under 10 minutes

• Easy to enable; requires no maintenance

• Accessing licensed content in Google Scholar

• Noteworthy settings and features

• Statistics show consistent use
Institution Settings

Proxy and Authentication

Proxy | Google Scholar | Download Authentication

Google Scholar

Send your journal titles to Google to create links in Google Scholar. Whether or not Google Scholar is enabled can be overridden in an individual collection's settings.

View Google Scholar documentation on OCLC site.

* Required field

Enable Google Scholar

- Yes
- No

Library Display Name

- University of Louisville, Belknap Campus

Keywords

- EKU Library Louisville University

Contact Name

- Dana Reid

Contact Email

- dana.reid@louisville.edu

Full Text Link Label

- FindIt@UofL

Print Link Label

- Search U of L Library

OpenURL Base URL


OpenURL Options

- DOI
- PMID
- Journal title only

Viewable Link Access

- Restrict ability to view links to IP address(es) I have added.
- Make links available within and outside of IP address(es).

IP Addresses

<table>
<thead>
<tr>
<th>IP Address / Range of Addresses</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>138.165.9.0-138.165.255.255</td>
<td></td>
</tr>
<tr>
<td>216.249.138.0-216.249.138.24</td>
<td></td>
</tr>
</tbody>
</table>
Long COVID in children and adolescents

Authors: T Stephenson

Publication: Current Opinion in Infectious Diseases, Volume: 35, Issue: 5, Page(s): 451
Published: Wolters Kluwer Health, Lippincott Williams and Wilkins, 2022
ISSN: 0951-7375
DOI: 10.1097/QCO.0000000000000854

Full text availability for this item

View Full Text  
Collection: Journals@Ovid  
Coverage: 1966-present, volume: 1-present, issue: 3-present

Browse related articles

Explore articles from this issue of Current Opinion in Infectious Diseases  
Explore articles from most recent issue of Current Opinion in Infectious Diseases

Request a copy of this item

Request Item through Interlibrary Loan
“Library search” redirects to record in worldcat.org
Surface links to dissertations and theses
Google Scholar button is available as a plug-in for Chrome, Firefox, and Safari browsers.
Highlight any text when searching online.
Signed in off-campus access links

Use my on-campus library subscriptions to enable off-campus links.

Signed in search activity

Use my search activity to improve search results and recommendations.

Save
Cancel
Data Shows Use

- Statistics show consistent, high-volume use of Google Scholar links
- Looking at “full text activity by referrer”
  - “Referrer” is the 3rd party redirecting a user to licensed content
- Google consistently in the top 5
Thank you!

Diana Reid
University of Louisville
diana.reid@louisville.edu
Lisa Olsen
Product Analyst, Metadata & Digital Services
Maximize Google Scholar Visibility

- Request access to Collection Manager oc.lc/getCM
- Set up automated holdings feeds for knowledge base collections oc.lc/autoload
- Enable Google Scholar export in Collection Manager oc.lc/google-scholar

Learn more at oc.lc/getCM
OCLC cataloging community meeting

David Whitehair
DIRECTOR, METADATA & DIGITAL SERVICES
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Erik Mayer
PRODUCT ANALYST, METADATA & DIGITAL SERVICES
mayere@oclc.org

Lisa Olsen
PRODUCT ANALYST, METADATA & DIGITAL SERVICES
olsenl@oclc.org

#OCLCcataloging
OCLC Data Quality update

- Shanna Griffith
- Robin Six
- Jay Weitz
- OCLC Data Quality team
Data Quality topics & updates

- Virtual AskQC Office Hours
- Data labeling project
- A thrilling adventure in BFAS updates
- Live Q&A on all things cataloging
Shanna Griffith
Senior Data Analyst
Upcoming Virtual AskQC Sessions

Bibliographic Formats and Standards (BFAS), the early chapters
- Tuesday, 14 February – 10 AM Eastern
- Thursday, 23 February – 4 PM Eastern

Languages, non-Latin scripts, and the mysterious MARC 880 fields
- Tuesday, 14 March – 10 AM Eastern
- Thursday, 23 March – 4 PM Eastern

Data and algorithms and bibs, oh my!
- Tuesday, 11 April – 10 AM Eastern
- Thursday, 20 April – 4 PM Eastern

What’s in a name? Descriptive access points overview
- Tuesday, 9 May – 10 AM Eastern
- Thursday, 18 May – 4 PM Eastern

Cataloging rare materials defensively
- Tuesday, 6 June – 10 AM Eastern
- Thursday, 15 June – 4 PM Eastern
Registration and session links

See [oc.lc/askqc](https://oc.lc/askqc) for

- Current session registrations
- Previous session recordings
- FAQs
- Questions from the sessions
Robin Six
Senior Data Analyst

Nathan Putnam
Director, Data Quality
We are developing a machine-learning model to identify duplicate records in WorldCat.
These models need **source data**, marking what the model should find.
You, the experts, can help validate the model’s understanding of duplicate records.
Usage stats

Top three contributing institutions
- Cleveland Museum of Art
- Indiana University
- Salisbury University

Top 5 fields used for decisions
- 245 – Title statement
- 300 – Physical description
- 260 – Publication, etc. statement
- 100 – Main entry - personal name
- 264 – Publication, etc. statement

Top three review outputs
- 4,136
- 1,215
- 1,140

Daily contribution counts

Source: OCLC, Data Science | Data as of 30 January 2023
Labeling project tool

• Tool for OCLC members to use their cataloging expertise
• Enhance our machine learning model’s understanding of duplicates
• 20,000 pairs of potentially duplicate records
• Each pair is reviewed by three different catalogers
• The labeling tool remains open through 28 February 2023
Search for your institution by OCLC symbol, institution name or zip code.

Search Query

Input Text...

If you are not sure of the name, type in the first full word and choices will appear from the list of available institutions. Enter a zip code to see a list of institutions within that area.

CONTINUE
### Record 1

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>cam a</td>
<td>M</td>
</tr>
<tr>
<td>1049733403</td>
<td></td>
</tr>
<tr>
<td>730515x1957</td>
<td></td>
</tr>
<tr>
<td>iluack</td>
<td>b</td>
</tr>
<tr>
<td>000 0 eng d</td>
<td></td>
</tr>
<tr>
<td>$a</td>
<td>56005012</td>
</tr>
<tr>
<td>$b eng</td>
<td>$c NAM</td>
</tr>
<tr>
<td>Missing Entry</td>
<td></td>
</tr>
<tr>
<td>$a MacEachern, Malcolm Thomas, Sd 1881-1956</td>
<td></td>
</tr>
<tr>
<td>$a Hospital organization and management.</td>
<td></td>
</tr>
<tr>
<td>$a [Rev. 3d ed.]</td>
<td></td>
</tr>
<tr>
<td>Missing Entry</td>
<td></td>
</tr>
<tr>
<td>$a Chicago. : $b Physicians' Record Co., $c 1957.</td>
<td></td>
</tr>
<tr>
<td>$a xlii, 1,318 pages. : $b illustrations, color portrait, forms. : $c 25 cm</td>
<td></td>
</tr>
</tbody>
</table>

### Record 2

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>cam a</td>
<td>Ma</td>
</tr>
<tr>
<td>c001</td>
<td></td>
</tr>
<tr>
<td>967844886</td>
<td></td>
</tr>
<tr>
<td>990105x1957</td>
<td></td>
</tr>
<tr>
<td>iluack</td>
<td>b</td>
</tr>
<tr>
<td>001 0 eng d</td>
<td></td>
</tr>
<tr>
<td>$a</td>
<td>56005012</td>
</tr>
<tr>
<td>$b eng</td>
<td>$c CASUM</td>
</tr>
<tr>
<td>Missing Entry</td>
<td></td>
</tr>
<tr>
<td>$a Ra71$ b M24 1957</td>
<td></td>
</tr>
<tr>
<td>$a MacEachern, Malcolm Thomas, Sd 1881-1956</td>
<td></td>
</tr>
<tr>
<td>$a Hospital organization and management / $c by Malcolm T. MacEachern.</td>
<td></td>
</tr>
<tr>
<td>$a Rev. 3rd ed.</td>
<td></td>
</tr>
<tr>
<td>Missing Entry</td>
<td></td>
</tr>
<tr>
<td>$a Chicago. : $b Physicians' Record Co., $c 1957.</td>
<td></td>
</tr>
<tr>
<td>$a xlii, 1318 pages, 27 unnumbered leaves of plates. : $b illustrations (some color). : $c 25 cm</td>
<td></td>
</tr>
</tbody>
</table>

Do these two records describe the same item?
- Yes
- No
- Unsure

Use checkboxes to select the fields most relevant to your decision.

https://labelduplicates.worldcat.org/
Do these two records describe the same item?
- Yes
- No
- Unsure

Use checkboxes to select the fields most relevant to your decision

Submit Decision

https://labelduplicates.worldcat.org/
Labeling project resources

Labeling Tool
https://labelduplicates.worldcat.org/

Participation Instructions
https://www.oclc.org/content/dam/oclc/worldcat/data-labeling-participation-instructions.pdf

FAQ
https://www.oclc.org/content/dam/oclc/worldcat/data-labeling-faq.pdf
Join the fun!

You are the cataloging experts!

It’s Fun!

Compete against friends and rivals!
Jay Weitz
Senior Consulting Database Specialist
A “Thrilling Adventure in BFAS Updates”

- Bibliographic Formats and Standards (BFAS)
  - Thrills
  - Adventures
  - RDA Examples
  - Updates
Weekly meetings

• Bibliographic Formats and Standards (BFAS)
  – Policy Decisions
  – Grammar Debates
  – Vocabulary Lessons
  – Nonstop Laughs
MARC Bibliographic Updates

• Update No. 33 (November 2021)
  – Including Data Provenance subfields in over 80 fields
  – New Data Provenance Subfields section added to Control Subfields page
• Update No. 34 (July 2022)
• Update No. 35 (December 2022)

#OCLCcataloging
Punctuation


Dates Fixed Fields

- DtSt: Type of Date/Publication Status (008/06)
- Dates: Date 1 and Date 2 (008/07-14)
MARC 21 Elements Not Implemented in OCLC

• Previously separate “MARC 21 Elements Not Implemented in OCLC”
• Now “MARC 21 and OCLC-MARC” in BFAS Chapter 1.1
New Sections in BFAS Chapter 2

- Chapter 2.9: Controlling and Enrichment
  - Online heading control
  - Offline heading control

- Chapter 2.10: Cataloging Practices
  - RDA elements and practices in WorldCat

Photo by RoonZ.nl on Unsplash

#OCLCcataloging
Revision of the Revision History

• Abstract and Revision History
  – Revised
  – Expanded

• Abstract and Revision History
  – Revised
  – Expanded

Photo by pgaberski on Unsplash
OCLC Data Quality update

SHANNA GRIFFITH, SENIOR DATA ANALYST
ROBIN SIX, SENIOR DATA ANALYST
NATHAN PUTNAM, DIRECTOR, DATA QUALITY
JAY WEITZ, SENIOR CONSULTING DATABASE SPECIALIST

Questions?
Send comments and questions in Chat to “Everyone”
Final notes

Recordings, slides & notes

• Watch your email
  – Webex email
  – Listservs
• Linked on the OCLC 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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  – Cataloging and Metadata
  – Record Manager
  – Collection Manager
• Linked on the AskQC help site

Continue the conversation

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

#OCLCcataloging
Thank you to our presenters!