OCLC cataloging community meeting

9 JUNE 2023
Welcome back

Nathan Putnam
Director, Data Quality & Governance
OCLC
Today’s schedule

First session

• Welcome
• Diversity, equity, inclusion
  – The U.S. Board on Geographic Names – An Overview of the Processes for Approving Geographic Names for Federal Use
  – Reparative Geographic Name Changes: Case Studies in Cataloging
  – Queering the Catalog: SACO Gender and Sexuality Funnel
  – Rapid Harm Reduction Through Locally-Defined Subjects in WorldCat Discovery
• Short break

Second session

• OCLC cataloging update
• OCLC Data Quality update
• Closing

#OCLCcataloging
OCLC Cataloging Update

David Whitehair
Director, Metadata & Digital Services
OCLC

Anne Washington
Product Analyst, Metadata & Digital Services
OCLC

#OCLCcataloging
Linked Data
Why linked data
OCLC improves access to bibliographic metadata by working with the global library community to create and nurture a linked data ecosystem that encompasses infrastructure, data, applications, APIs, and a global network.
Solving for a variety of challenges

• Increasingly complex and messy hybrid environments
• Disparate URIs make authority work difficult and time-consuming
• Lack of tools supporting a unified cataloging environment prohibits data connections
• Inability for data to serve multiple workflows leads to duplicative creation and curation
• Absence of ecosystem that enables shared, collaborative linked data management at scale promotes disparate workflows which are ill-suited and unsustainable
• Increasing need for metadata work to support DEI initiatives
Building a comprehensive and sustainable linked data ecosystem

- **Create a global identifier** that can be used across workflows by adding to MARC data
- **Release tools that bridge the gap** between traditional records and linked data frameworks to enable seamless creation and curation of data
- **Add entities and entity types** (including Persons, Works, Concepts, Events, and Organizations) to enrich data set
- **Enhance our data model/ontology** designed to describe entity types in the library domain and maximize their relational impacts
Connexion
Attention Connexion client users

• If you are using the Windows-based Connexion client, this update does not apply to you.

• I repeat… this update does not relate to Connexion client.

• There are no changes to Connexion client.

• Hey, does this information impact Connexion client?  Nope!
What you need to know

• We’re discontinuing Connexion browser on **30 April 2024**

• We encourage you to make the switch to WorldShare Record Manager today; access is already included in your cataloging subscription

• Record Manager is a modern, web-based cataloging solution that supports all the workflows you’re accustomed to with Connexion browser, plus much more

• We’re committed to providing the support and resources needed to make the transition as quick and easy as possible

• We will continue to support the Windows-based Connexion client, so users of the locally installed software can continue to use Connexion client as normal
What do users think?

“Record Manager is super easy to use—a lot less steps than Connexion browser.”

Martha Higgins, Carnegie Endowment for International Peace Library

“It was really easy to transition from Connexion browser to Record Manager.”

Connie Sterner, Natural Resource Building Library, Fish and Wildlife

“…Record Manager provides greater flexibility in the searching process through its selected facets for finding specific bibliographic records that match both physical and digital acquired resources.”

Milagros Dominicci, University of Puerto Rico, Rio Piedras Campus
Why switch to Record Manager?

• Work in a more intuitive and efficient cataloging environment with improved search functionality to more easily find WorldCat® records for copy cataloging and managing WorldCat holdings

• Better serve diverse communities through non-Latin script data in WorldCat records

• Locally manage staff users and permissions through email-based WorldShare authentication

• Leverage more label formats plus the option to create custom labels

• Access more authority files, including AAT, BNE, Canadiana, GND Authorities, LC, Māori Subject Headings, MeSH Authorities, NTA Names, and RVM.

• View more UI language options, including English, Simplified and Traditional Chinese, Dutch, French, German, Italian, Japanese, Korean, and Spanish
How will we support you?

We’re here to help! To make this transition as easy as possible, the following resources are available to you:

✓ Links to live trainings and dedicated office hours where you can connect with OCLC staff and ask questions
✓ On-demand demos and introduction videos
✓ Functionality comparison chart and a detailed action-by-action comparison table
✓ Log-in/credential assistance
Make the switch to WorldShare Record Manager

WorldShare Record Manager is a modern, web-based cataloging solution that supports all the workflows you’re accustomed to with Connexion® browser, plus so much more.

We’re discontinuing Connexion browser on 30 April 2024. Record Manager is already included in your cataloging subscription, so we encourage you to begin your transition today. We will continue to support the Windows-based Connexion client, so users of the locally installed software can continue to use Connexion client for their cataloging workflows.

Get started with Record Manager
Attention Connexion client users

- If you are using the Windows-based Connexion client, this update does not apply to you.
- I repeat… this update **does not relate to Connexion client**.
- There are **no changes to Connexion client**.
- Hey, does this information impact Connexion client? Nope!
WorldShare Collection Manager and WorldCat knowledge base
WorldShare® Collection Manager

• 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 collections
Automate your holdings management

Future partners:

For more information, visit oc.lc/autoload
OCLC Control Number Coverage

- Goal: 100% of titles in global WorldCat knowledge base collections will match to WorldCat bibliographic records
- Recent: Analysis completed to add more OCNs to the WorldCat knowledge base
  - 700k OCNs added in March
  - 616k added in April/May
- Coming Soon: New automated process to create WorldCat records
  - ELvl = 3 with special 040 value to denote created by automation
  - Recorded on Collection Manager activity history
  - Retrievable in Record Manager and Connexion to upgrade
  - Upgrades available via Collection Manager WorldCat Updates
Automated creation of WorldCat records

Titles added to WorldCat knowledge base → KB titles matched to WorldCat bibliographic records → New records created if no match

WorldCat holdings managed → WorldCat MARC records output → Titles discoverable in WorldCat and WorldCat Discovery

NEW!

#OCLCcataloging
WorldCat Metadata API
WorldCat Metadata API 2.0

- Now available!
- Read and write Local Holdings Records (LHRs)
- Search WorldCat and receive single best-match WorldCat bibliographic record from multiple matches
- Search Local Bibliographic Data (LBD) records on a variety of indexes
- Previously added to 1.1: search WorldCat on additional indexes rather than only by OCLC Number
- WorldCat Metadata API 1.x will be decommissioned on 30 April 2024

For more information and comparison table, visit [oc.lc/metadataapi]
Please enter questions in chat and send to everyone.
OCLC Data Quality Update

Cynthia Whitacre
Senior Metadata Operations Manager, Metadata Engagement
OCLC

Laura Ramsey
Senior Metadata Operations Manager, Data Quality
OCLC

#OCLCcataloging
Merging in Record Manager

- Merging functionality coming soon!
- Watch for announcements in the Record Manager and Member Merge Community Centers
- Details will be included in Record Manager release notes once functionality is available
Shaded areas show missing fields in the compared record.
Field level alignment to make for easy comparison.
DDC Enrichment

Goal: add DDC numbers to bib records that lack them
• Class number comes from other records in a work cluster
• Formatting and conditions set by Alex Kyrios, Senior Dewey Editor
• Treat as any other class number found in a record

Progress so far
• ~33 million records processed since February of an expected 85M

Example
• 082 04 $a 306.909421 $q OCoLC $2 23/eng/20230216
Data labeling project outcomes

• Collected data on 34,356 pairs of potential duplicate records
  – Data used to train the deduplication model
  – Data Quality staff reviewed results from the model
• More information: April 2023 VOAH session at oc.lc/askqc
• Next steps: applying the model to WorldCat
  – Stay tuned for details, coming soon!
# Virtual AskQC Office Hours

<table>
<thead>
<tr>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>November</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloging rare materials defensively</td>
<td>De-biasing Dewey: righting the past by rewriting the classification</td>
<td>Rapid harm reduction with locally preferred subjects in WorldCat Discovery</td>
<td>Get informed about genre/form terms</td>
<td>MARC fields for manuscripts and archival collections</td>
</tr>
</tbody>
</table>

Registration at [oc.lc/askqc/](http://oc.lc/askqc/)
Join us in-person @ ALA

• OCLC Cataloging Community Meeting
  Friday, June 23 at 10:30
  McCormick Place, Rm W179a

• Meet with OCLC staff and colleagues
• Ask cataloging policy questions
• Get the latest and greatest info
• Celebrate Jay!

#OCLCcataloging
Celebrating Jay Weitz!

Congratulations to Jay Weitz, who recently received the MLA Citation at the Music Library Association’s annual conference. The MLA Citation, the Association’s tribute for lifetime achievement, is awarded in recognition of distinguished service to music librarianship over a career. Citation recipients become Honorary Members of the Music Library Association. Jay is a Senior Consulting Database Specialist on the WorldCat Quality Management team in Dublin, and has served since 1989 as OCLC’s liaison to the music catalogs community.
Dear Jay,

It was very exciting to see the young man who took over from me as the music specialist at OCLC. You are to be congratulated for making yourself into the person to go to for the answers to all music cataloging questions. Have a good retirement, Robert

From Robert Cunningham

---

Dear Jay,

Congratulations on your retirement! You have made the cataloging world a better place for thousands of us catalogers over the decades! You have made such a positive difference in our lives!

I have enjoyed all of your many cataloging workshops ... and the many workshops that we co-taught. Some of my happiest memories of work have been co-teaching with you!

All my best wishes,
Julie Moore

---

Hi Jay,

Congratulations on your retirement! Wow, OCLC without Jay, that’s like spring without flowers. I will miss your calm kind presence, wisdom, and wonderful sense of humour.

All the best,
Adolfo

From Adolfo Tarango

---

Scan this code to add your own message

#OCLCcataloging
Jay,
As others have said, it's hard to picture the library world without you, which only proves how much you deserve a fun, relaxing and joyous retirement! I wish you the very best.
Peace,
Isabel Quintana

From Isabel Quintana

Congratulations, Jay--I'll miss working with you very much. I'm not sure how long we've known each other, but it's a long time! I've always appreciated your calm demeanor, level headedness, and willingness to figure out how to make things happen--and ability to explain why not if things can't happen.

Bob Maxwell

From Bob Maxwell
Please enter questions in chat and send 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
  – Webex email
  – Listservs

• Linked on the OCLC Community Center
  – 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
Thank you to our presenters!
And thank you to our community!