

**OCLC cataloging  
community meeting**

Final Session

# OCLC cataloging community meeting

**9 JUNE 2023**

**#OCLCcataloging**





## Nathan Putnam

Director, Data Quality & Governance  
**OCLC**

# Welcome back

# 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

# OCLC cataloging community meeting

## OCLC Cataloging Update



**David Whitehair**

Director, Metadata & Digital Services  
**OCLC**



**Anne Washington**

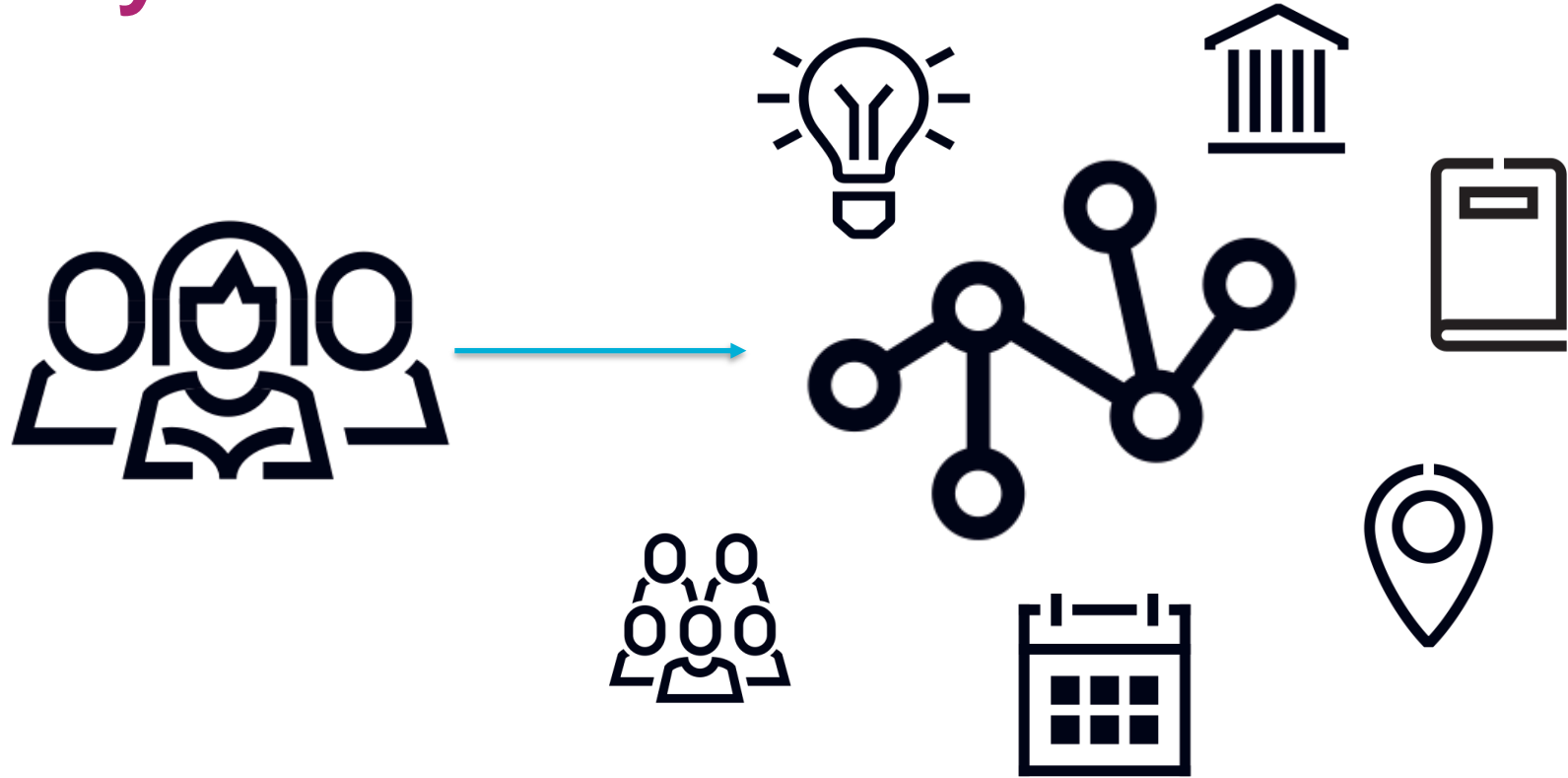
Product Analyst, Metadata &  
Digital Services  
**OCLC**

#OCLCcataloging



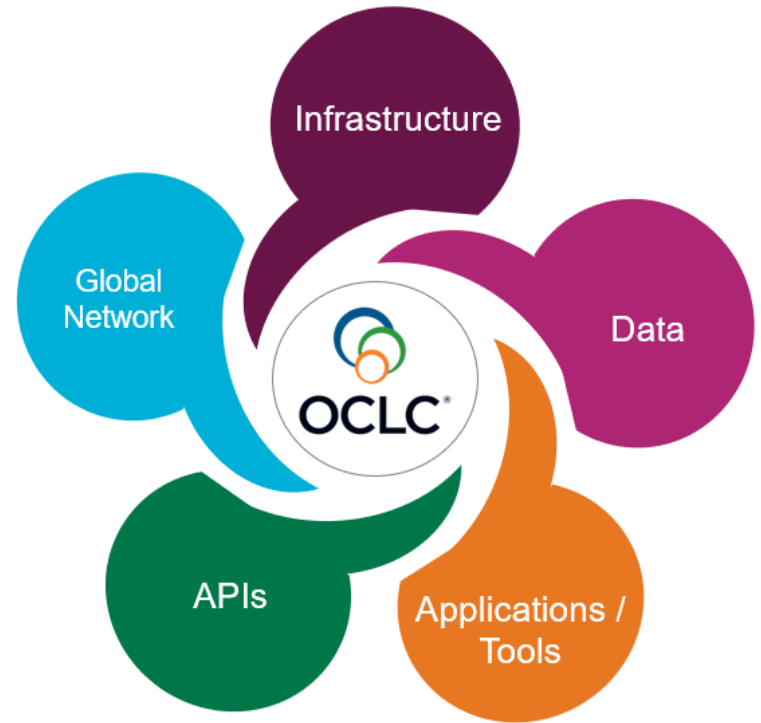
# Linked Data

# Why linked data



# OCLC linked data ecosystem

**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

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[Get started with Record Manager](#)



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# WorldShare Collection Manager and WorldCat knowledge base



# WorldShare<sup>®</sup> 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



For more information, visit [oclc.org/autoload](https://oclc.org/autoload)

Future partners:



# OCLC cataloged collections



American Academy  
of Pediatrics  
DEDICATED TO THE HEALTH OF ALL CHILDREN™



THE HISTORYMAKERS.™



Taylor & Francis  
an informa business

SPRINGER NATURE



CAMBRIDGE



JSTOR



ROYAL SOCIETY  
OF CHEMISTRY

Boom



AMERICAN  
PSYCHIATRIC  
ASSOCIATION



ELSEVIER

medici.tv

Knovel®



ASPEN  
PUBLISHING



Wolters Kluwer



OMNIGRAPHICS



vandeplas  
publishing

EBSCO



IEEE

Advancing Technology  
for Humanity

O'REILLY

WILEY



Wageningen Academic  
Publishers



ELSEVIER

ClinicalKey™

WEST  
ACADEMIC

The Metropolitan Opera Guild

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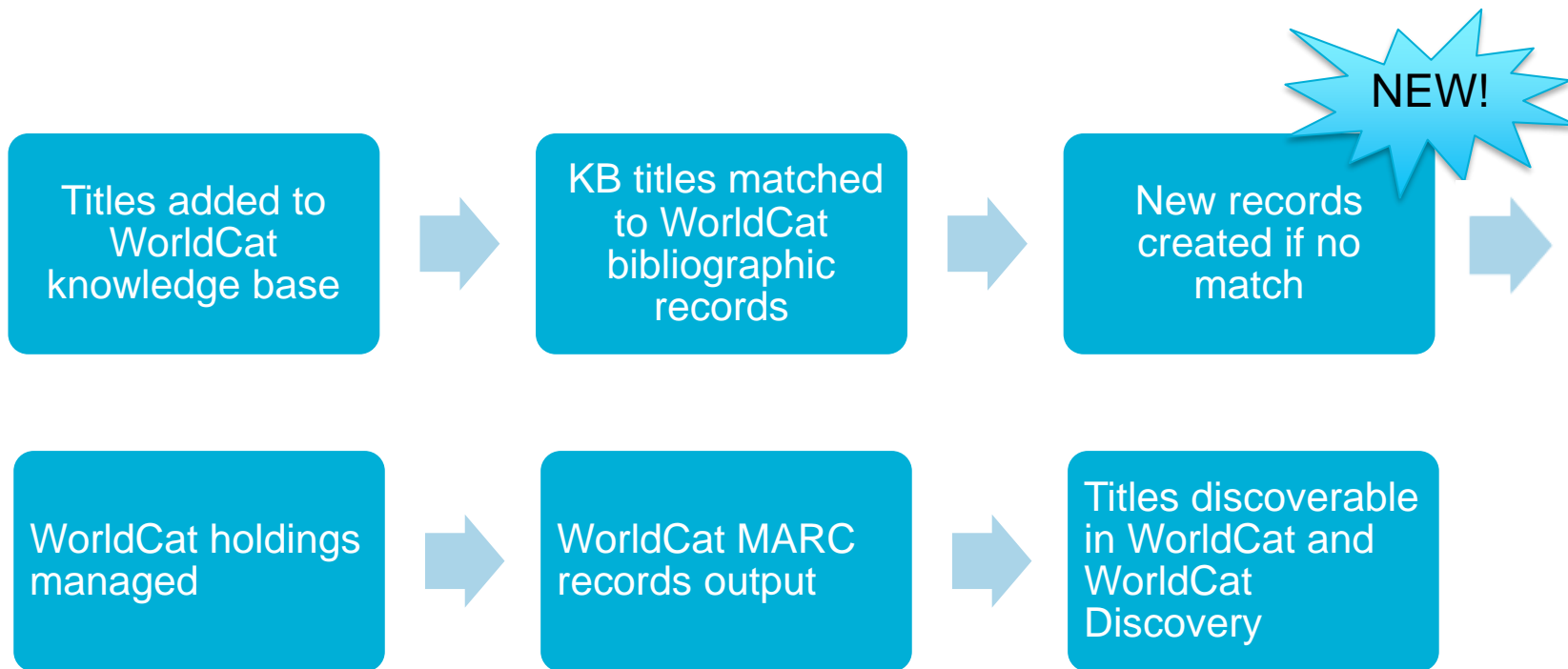
For more information, visit [oclc.org/cataloged-collections](https://oclc.org/oclc/cataloged-collections)

OCLC™

# 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



# 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 [oclc.org/metadataservice](https://oclc.org/metadataservice)

# OCLC Cataloging Update



Please enter  
questions in  
chat and send  
to everyone

# OCLC cataloging community meeting

## OCLC Data Quality Update



**Cynthia Whitacre**

Senior Metadata Operations  
Manager, Metadata Engagement  
**OCLC**



**Laura Ramsey**

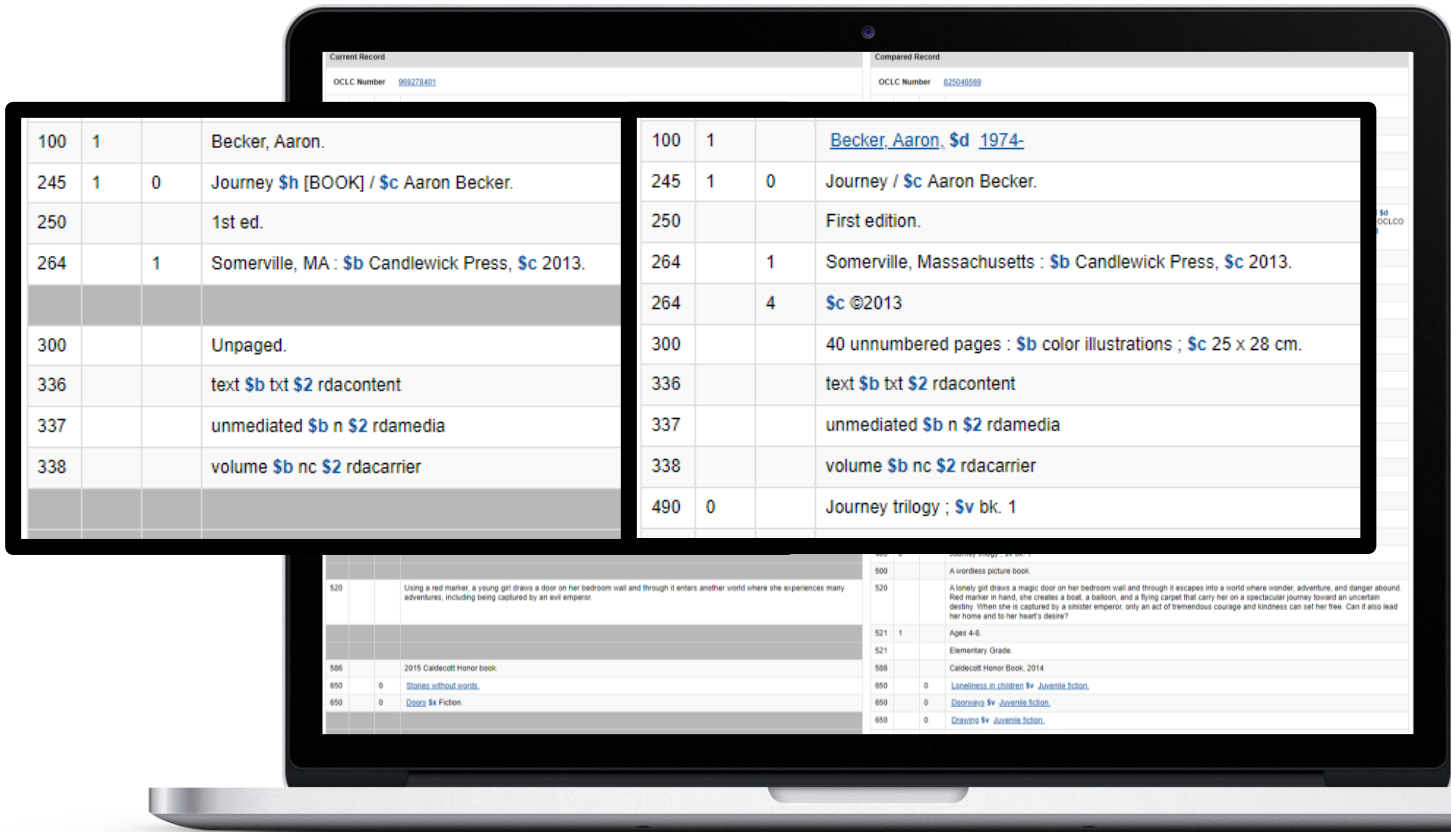
Senior Metadata Operations  
Manager, Data Quality  
**OCLC**

# 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.

Current Record				Compared Record			
Tag	Ind 1	Ind 2	Data	Tag	Ind 1	Ind 2	Data
OCLC Number <a href="#">969278401</a>				OCLC Number <a href="#">825048589</a>			
LDR			cam M	LDR			cam li
001			969278401	001			825048589
005			20230606151108 9	005			20230606151228 5
008			1208162013 mau 000 0 eng d	008			1208162013 mau b 000 1 eng d
010			2012947264	010			2012947264
040			OCWMS \$b eng \$c OCWMS \$d OCWMS	040			YDXCP \$b eng \$a rda \$c YDXCP \$d DLC \$d BTCTA \$d BDX \$d FLWMD \$d MLY \$d SINLE \$d FOLLT \$d Z33 \$d VPB \$d UIU \$d TXM \$d NGU \$d IAD \$d OCLCF \$d MOF \$d CDO \$d AHS \$d MJS \$d CKE \$d TBXL \$d CPP \$d ITD \$d WAU \$d TWYCL \$d OCLCO \$d CZL \$d OXK \$d VVK \$d OCLCO \$d OBVCP \$d OCLCO \$d OCLCO \$d NDS \$d OCLCO \$d OCL \$d OCLCO \$d OCWMS
019				019			855343785 \$a 855536973 \$a 858797257 \$a 880953966 \$a 936051981
020			9780763660536	020			9780763660536 \$q (hardback)
020			0763660531	020			0763660531 \$q (hardback)
042				042			lccopycat
082	0	0		082	0	0	P27 838125 \$b Ju 2013
082	0	4		082	0	4	[R] \$z 23
090			\$b	090			\$b
049			WEST	049			WEST
100	1		Becker, Aaron.	100	1		<a href="#">Becker, Aaron, 84 1974</a> .
245	1	0	Journey \$b (BOOK) / \$c Aaron Becker.	245	1	0	Journey / \$c Aaron Becker.
250			1st ed.	250			First edition.
264	1		Somerville, MA. \$b Candlewick Press, \$c 2013.	264	1		Somerville, Massachusetts. \$b Candlewick Press, \$c 2013.
264	4			264	4		\$c 02013
300			Unpaged	300			40 unnumbered pages. \$b color illustrations. \$c 25 x 28 cm.
336			text \$b tl \$2 rdacontent	336			text \$b tl \$2 rdacontent
337			unmediated \$b n \$2 rdamedia	337			unmediated \$b n \$2 rdamedia
338			volume \$b nc \$2 rdacarrier	338			volume \$b nc \$2 rdacarrier
490	0			490	0		Journey trilogy. \$v bk. 1
500				500			A wordless picture book.
520			Using a red marker, a young girl draws a door on her bedroom wall and through it enters another world where she experiences many adventures, including being captured by an evil emperor.	520			A lonely girl draws a magic door on her bedroom wall and through it escapes into a world where wonder, adventure, and danger abound. Red marker in hand, she creates a book, a balloon, and a flying carpet that carry her on a spectacular journey toward an uncertain destiny. When she is captured by a sinister emperor, only an act of tremendous courage and kindness can set her free. Can it also lead her home and to her heart's desire?
521	1			521	1		Ages 4-8.
521				521			Elementary Grade.
586			2015 Caldecott Honor book.	586			Caldecott Honor Book, 2014.
650	0		<a href="#">Stories without words.</a>	650	0		<a href="#">Loneliness in children \$v Juvenile fiction.</a>
650	0		<a href="#">Doodles \$4 Fiction.</a>	650	0		<a href="#">Doodles \$v Juvenile fiction.</a>
650	0			650	0		<a href="#">Drawing \$v Juvenile fiction.</a>



100	1		Becker, Aaron.
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264		1	Somerville, MA : \$b Candlewick Press, \$c 2013.
300			Unpaged.
336			text \$b txt \$2 rdacontent
337			unmediated \$b n \$2 rdamedia
338			volume \$b nc \$2 rdacarrier

100	1		<a href="#">Becker, Aaron</a> , \$d 1974-
245	1	0	Journey / \$c Aaron Becker.
250			First edition.
264		1	Somerville, Massachusetts : \$b Candlewick Press, \$c 2013.
264		4	\$c ©2013
300			40 unnumbered pages : \$b color illustrations ; \$c 25 x 28 cm.
336			text \$b txt \$2 rdacontent
337			unmediated \$b n \$2 rdamedia
338			volume \$b nc \$2 rdacarrier
490	0		Journey trilogy ; \$v bk. 1

Field level alignment to make for **easy comparison.**

520			Using a red marker, a young girl draws a door on her bedroom wall and through it enters another world where she experiences many adventures, including being captured by an evil emperor.
500			A wordless picture book.
520			A lonely girl draws a magic door on her bedroom wall and through it escapes into a world where wonder, adventure, and danger abound. Red marker in hand, she creates a boat, a balloon, and a flying carpet that carry her on a spectacular journey toward an uncertain destiny. When she is captured by a sinister emperor, only an act of tremendous courage and kindness can set her free. Can it also lead her home and to her heart's desire?
521	1		Ages 4-8.
521			Elementary Grade.
586			Caldcott Honor Book, 2014
650	0		<a href="#">Stories without words</a> .
650	0		<a href="#">Dooz! \$4 Fiction</a> .
650	0		<a href="#">Loneliness in children \$v Juvenile fiction</a> .
650	0		<a href="#">Doozies \$v Juvenile fiction</a> .
650	0		<a href="#">Drawing \$v Juvenile fiction</a> .

# 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 VOA session at [oclc.org/askqc](https://oclc.org/askqc)
- Next steps: applying the model to WorldCat
  - Stay tuned for details, coming soon!



# Virtual AskQC Office Hours

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

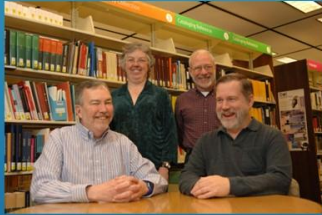
Registration at [oc.lc/askqc/](https://oc.lc/askqc/)

# 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!



# 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 catalogers community.



Jay Weitz



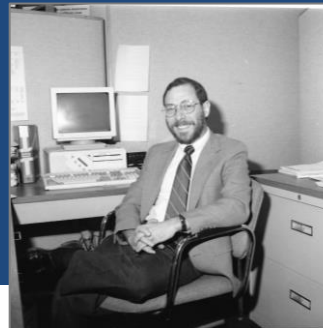


Dear Jay,

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



Scan this code to add your own message



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



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,

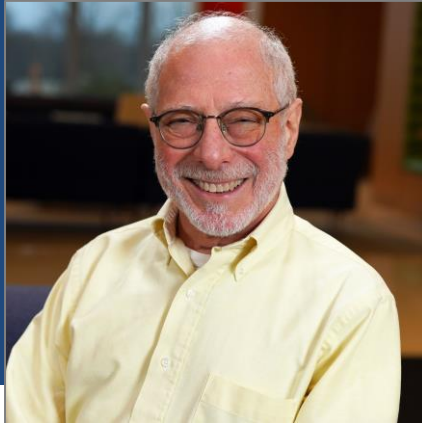
Isabel Quintana

...

From Isabel Quintana



Scan this code to add your own message



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

# OCLC Data Quality Update



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

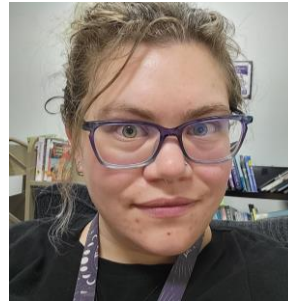
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## Continue the conversation

- Cataloging policy
  - Email [AskQC@oclc.org](mailto: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!



**OCCLC cataloging  
community meeting**

thank you

**And thank you to  
our community!**

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