OCLC cataloging community meeting

Final session

The OCLC cataloging community meeting

2 FEBRUARY 2024

#OCLCcataloging

OCLC

David Whitehair

Director, Metadata & Digital Services

OCLC

Welcome back

Today's schedule

- Welcome
- Diversity, equity, and inclusion
- Open questions

- OCLC update
- Open questions
- Closing

OCLC cataloging community meeting

OCLC update

Chelsea Dalgord
Product Manager,
Metadata & Digital Services

Jeff Mixter
Senior Product Manager,
Metadata & Digital Services

Lisa Olsen
Product Analyst,
Metadata & Digital Services

Laura Ramsey
Senior Metadata Operations
Manager, Data Quality

Hank Sway
Product Manager,
Metadata & Digital Services

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Linked data

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Expand influence and reach with linked data

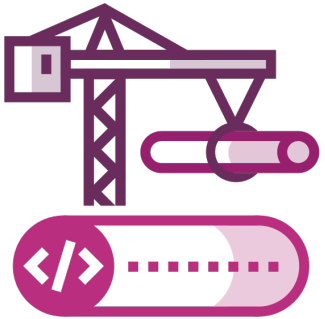
- Connect and scale library knowledge
- Fuel serendipitous discovery
- Focus on high-value knowledge work
- Contribute to the global information ecosystem

oc.lc/linkeddata

Delivering on our linked data strategy

Expertise

Data



Infrastructure

Tools

oc.lc/linkeddata

Linked data entities

- WorldCat Entities
  - Persons
  - Works
  - Places
  - Events
  - Organizations (March)
- Dewey and FAST
  - Concepts

WorldCat ontology

- OCLC is working with partner libraries to expand the data model based on library workflows and data needs
- Data model used to describe linked data entities in WorldCat Entities
- Worked with the community to conduct a diversity, equity, and inclusion review of the data model

Linked data integrations

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‘Linkifying’ WorldCat

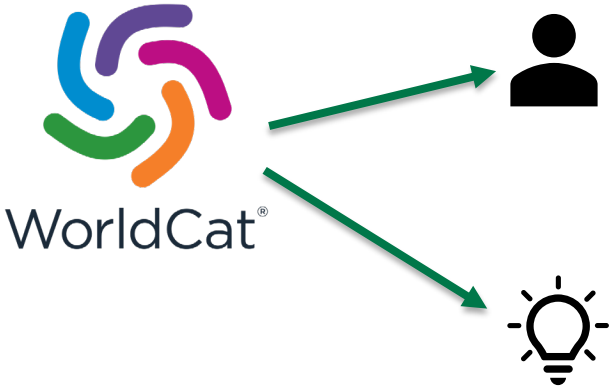
In December 2023, we loaded WorldCat Entities URIs into WorldCat records for: Person, Place, and Event entities.

‘Linkifying’ WorldCat

FAST identifiers and DDC classifications exist in WorldCat today

‘Linkifying’ WorldCat

We added links to Person entities



‘Linkifying’ WorldCat

We added links to Event entities

‘Linkifying’ WorldCat

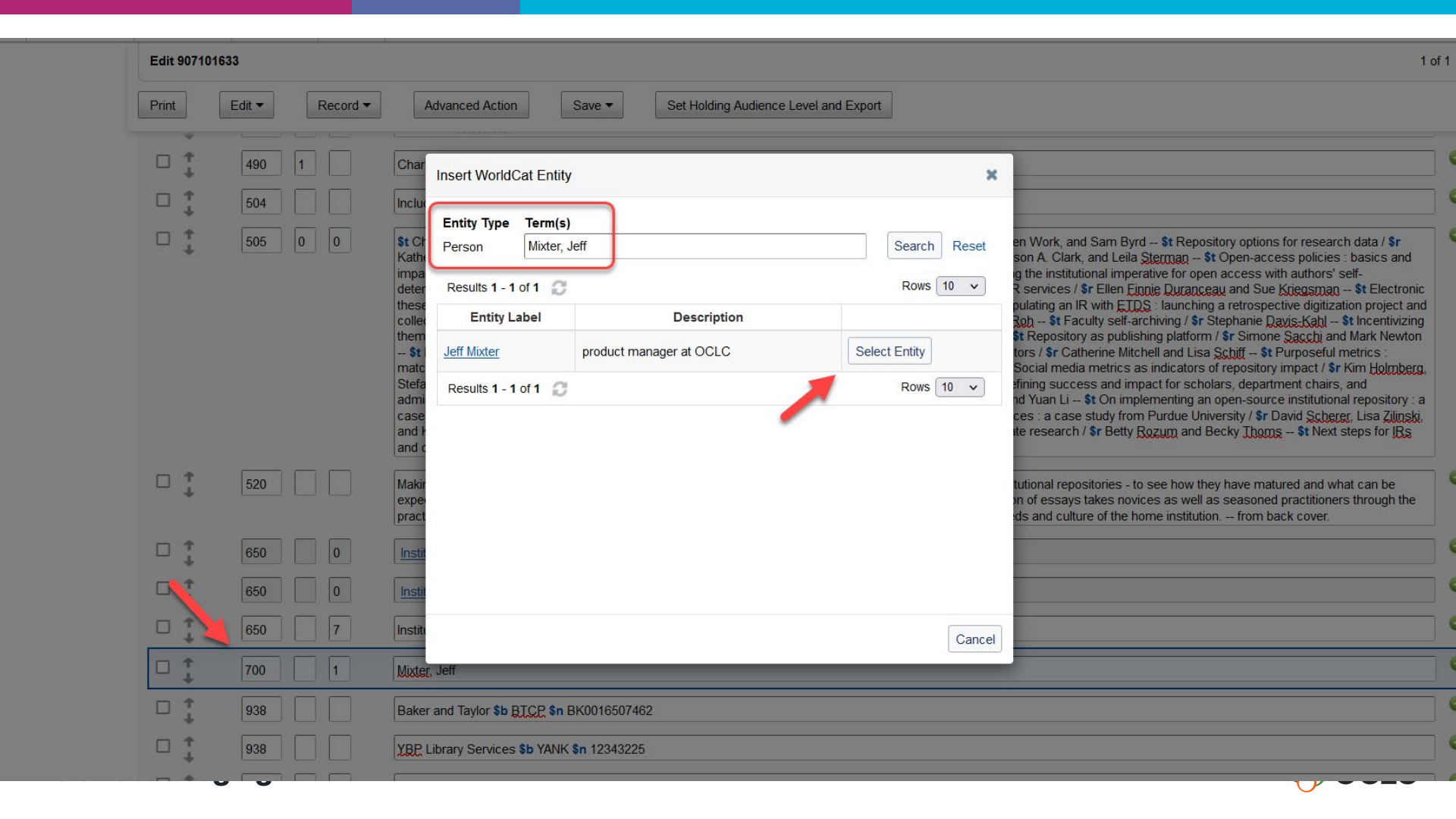
We added links to Place entities

‘Linkifying’ WorldCat

We have started adding links to Work entities

WorldShare Record Manager

- Can lookup WorldCat Entities and insert linked data identifiers to records within your existing cataloging workflow
- WorldCat Entities URIs can be added to fields:
  - Person entity – 100, 600, or 700
  - Event entity – 647
  - Place entity – 651
  - Work entity – 758
- Once an entity is selected it will appear in the $1 of the field


Edit 907101633
1 of 1
Print
Edit
Record
Advanced Action
Save
Set Holding Audience Level and Export
Insert WorldCat Entity
Entity Type
Term(s)
Person
Mixter, Jeff
Search
Reset
Results 1 - 1 of 1
Rows 10
Entity Label
Description
Jeff Mixter
product manager at OCLC
Select Entity
Results 1 - 1 of 1
Rows 10
Cancel
700 1 Mixter, Jeff
938 Baker and Taylor $b BTCP $n BK0016507462
938 YBP Library Services $b YANK $n 12343225

WorldCat Entities in MARC records

- WorldCat Entities identifiers display as a clickable link in WorldShare Record Manager and Connexion client

- Functionality to lookup and select WorldCat Entities coming to Connexion client at a future date

WorldCat® Entities

Search by Title, Author or Keyword

Sign in

- Top
- Key Information
- Significant Dates
- Related Persons and Organizations
- Related Places
- Related Works

View

Jeff Mixter

Copy URI Download

Entity ID: E39PBJtRJykHh8gwxXj3JQ4cyd
Entity Type: Person
Description: product manager at OCLC

Key Information

1-5 of 28

Language of Content	Entity Label	Description	Aliases
English	Jeff Mixter	product manager at OCLC	2
German	Jeff Mixter		0

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Entities workflows

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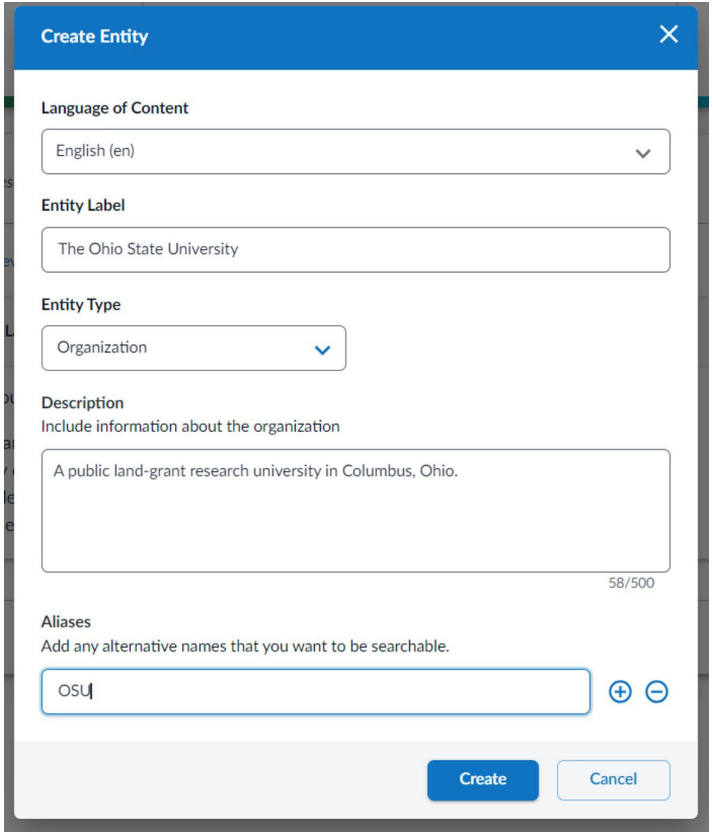
OCLC Meridian

- Create a new Organization entity



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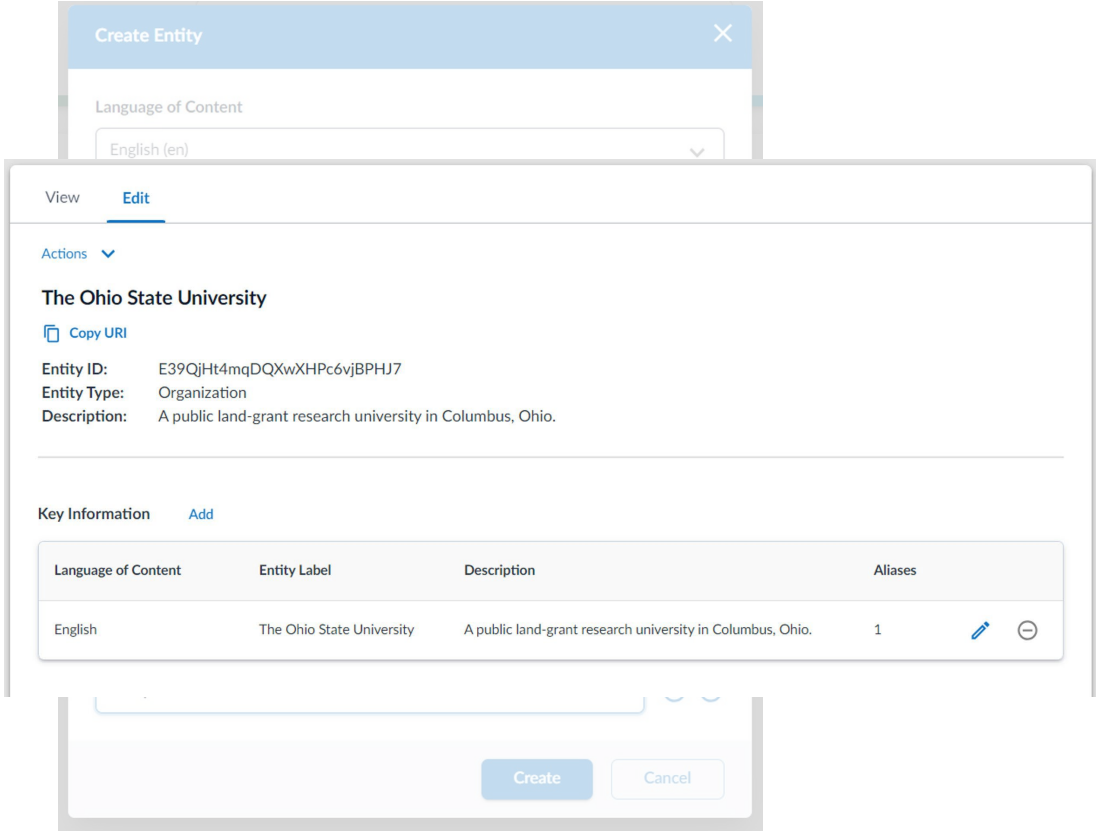
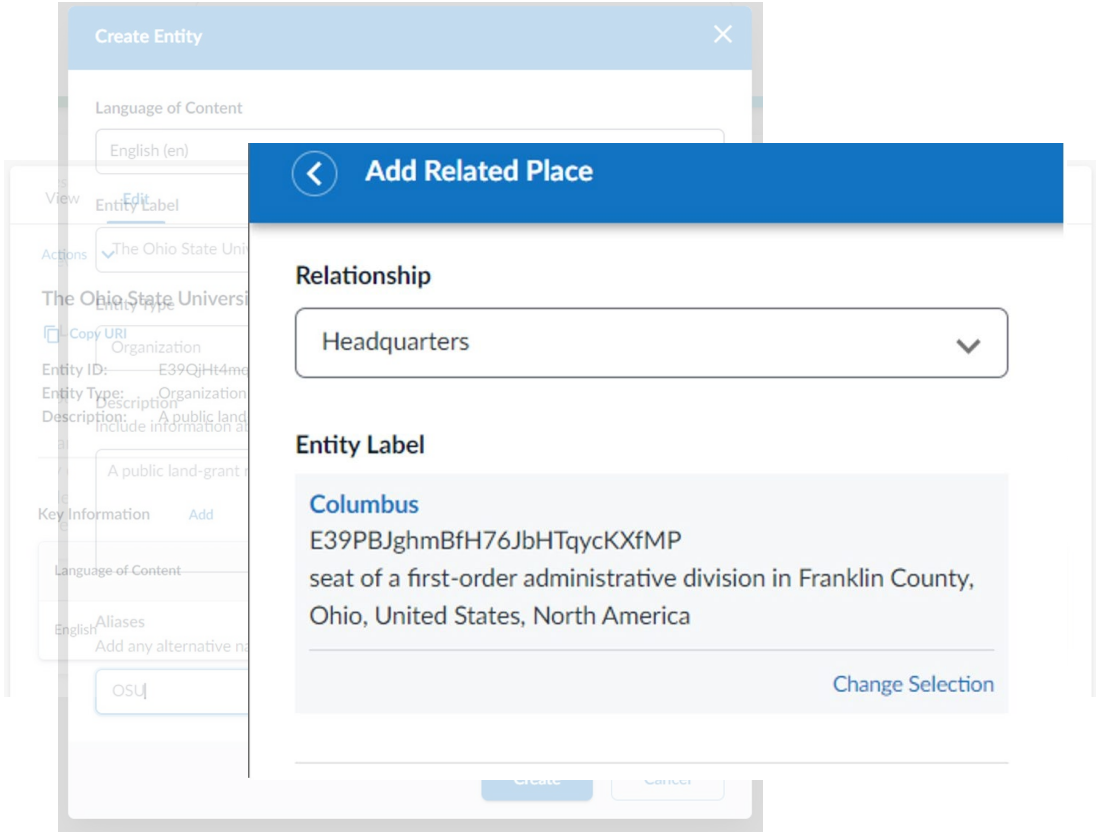
OCLC Meridian

- Immediately access a linked data URI



OCLC Meridian

- Connect the new entity to other entities in the WorldCat graph



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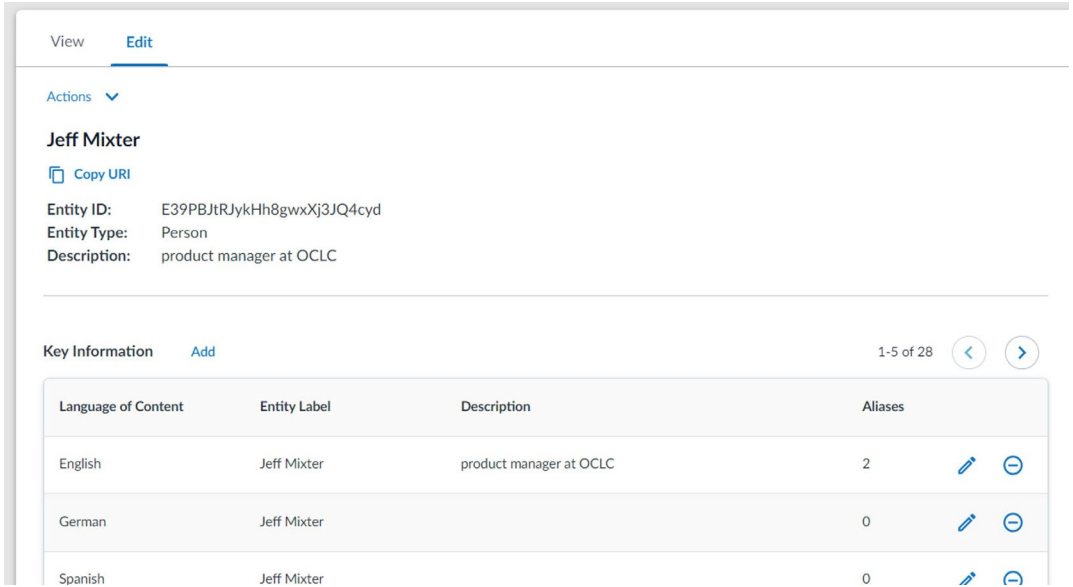
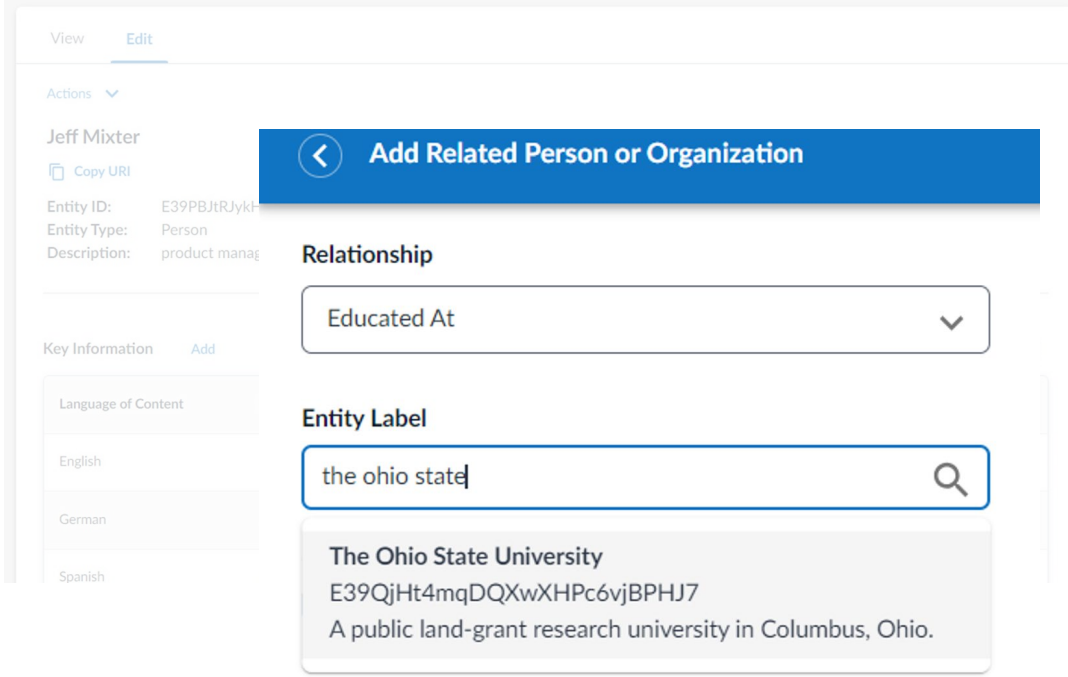
OCLC Meridian

- Find other connection points in the WorldCat graph



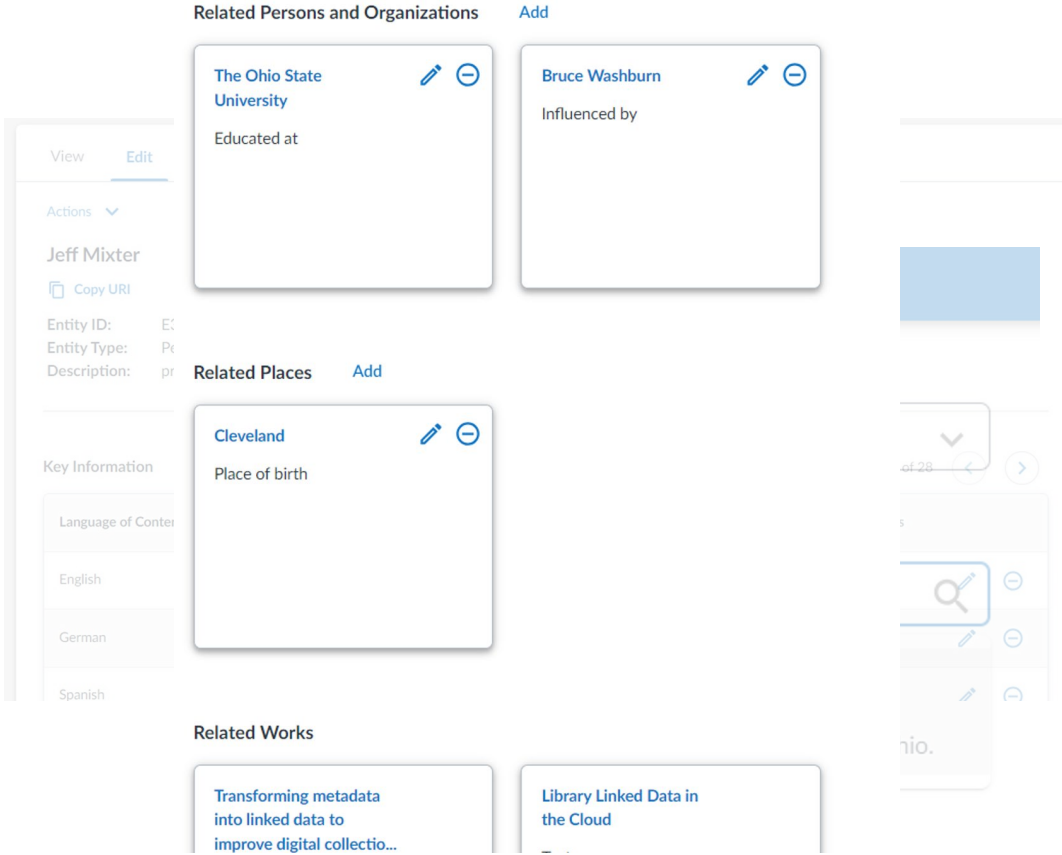
OCLC Meridian

- Connect them back to the new entity



OCLC Meridian

- Rich and meaningfully connected graph of data to serve library workflows



BIBFRAME workflows

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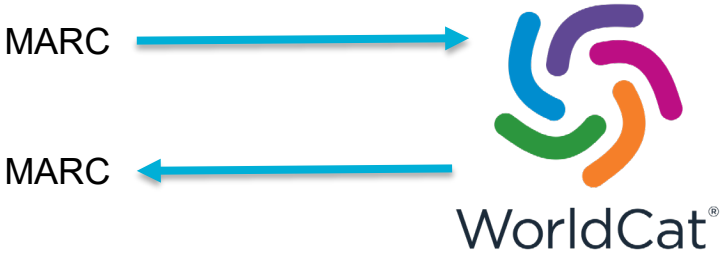
BIBFRAME editor

- We’re developing a BIBFRAME editor to meet the needs of librarians as they transition to non-MARC formats and face new data needs and workflows
- The new editor will work seamlessly back-and-forth with BIBFRAME and MARC data so libraries can choose the data format best suited for their workflows, systems, and staff

BIBFRAME ingest/export

BIBFRAME ingest/export



BIBFRAME ingest/export

BIBFRAME ingest/export

WorldCat quality

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Virtual AskQC Office Hours

Feb	Mar	April	May	June
The Lifecycle of a CIP record	Music Score Cataloging for the Uninitiated	PCC and OCLC: Overview and What's New	Who's Your Audience? Ways to Record Audience in Bibliographic Records	Customizing MARC Record Delivery with Collection Manager

Registration at **oc.lc/askqc**

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DDC Enrichment

- Since February of 2023, over 84 million DDC numbers have been added to WorldCat bibliographic records that lacked a number
- Saves time and increases efficiency for catalogers
- Class number came from other records in the same work cluster
- Addition of DDC numbers will be ongoing with updates a few times a year
- Example from OCLC #659859974:

  082 04 $a 306.909421 $q OCoLC $2 23/eng/20230216

Encoding Level Conversion Project

- Purpose of the project is to eliminate OCLC alphabetic encoding level values in WorldCat bibliographic records to standard MARC21 values
- Encoding level values J and K have been eliminated from WorldCat bibliographic records
- Conversion of value I is in progress with ~32 million records completed and ~9 million records remaining (as of Jan. 27)
- Value M will be converted in the future once value I is eliminated

Machine Learning Deduplication

- Phase 1 completed August-October of 2023
- 5.4 million duplicate records for print books in English, French, German, Italian, and Spanish were removed
- A small number of incorrect merges were reported and feedback will be used for future iterations of the model
- Community feedback was gathered through our data labelling tool for non-Latin scripts of Chinese, Japanese, Korean, Thai, Arabic, Hebrew, and Russian to use for future deduplication
- Next phase of ML deduplication is currently being defined

WorldCat Entities URI Enrichment

- In December 2023, WorldCat Entities URIs were added to WorldCat bibliographic records
- Subfield $1s were added to MARC fields 100, 600, 647, 651, and 700
- Languages of headings: English, German, Dutch, Spanish, and French
- Total number of headings with subfield $1 insertions: 175M

WorldCat Entities URI Enrichment

Examples from OCLC #316483:

100 1_ $a Sevareid, Eric, $d 1912-1992, $e author. $1 https://id.oclc.org/worldcat/entity/E39PBJyrWWTFrcRkh4GtcffTHC

600 17 $a Sevareid, Eric, $d 1912-1992. $2 fast $0 (OCoLC)fst00037345 $1 https://id.oclc.org/worldcat/entity/E39PBJyrWWTFrcRkh4GtcffTHC

647 _7 $a World War $d (1939-1945) $2 fast $0 (OCoLC)fst01180924 $1 https://id.oclc.org/worldcat/entity/E39Qhp4vBbhpRH9XvjbDFXtxhb

651 _7 $a United States. $2 fast $0 (OCoLC)fst01204155 $1 https://id.oclc.org/worldcat/entity/E39PBJtxgQXMWqmjMjjwXRHgrq

700 1_ $a Stein, Gertrude, $d 1874-1946, $e contributor. $1 https://id.oclc.org/worldcat/entity/E39PBJhhpHr4vrM87p4BrDHjYP

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WorldCat Entities URI Enrichment

- The second phase of URI enrichment began the weekend of Jan. 27th with the addition of $1 for Works
- Subfield $1s are being added to MARC field 758

Example for English language of cataloging:

758__$i has work: $a HBR's 10 must reads on managing people Vol. 2 (Sound) $1
https://id.oclc.org/worldcat/entity/E39PCGDbpB6QKpK4gc9MwdDFVd $4
https://id.oclc.org/worldcat/ontology/hasWork

Example for French language of cataloging:

758__$i a pour œuvre: $a Le mouvement chrétien-social dans le canton de Genève (Text) $1
https://id.oclc.org/worldcat/entity/E39PCYvWdGxTkMYkvJgfF78Phw $4
https://id.oclc.org/worldcat/ontology/hasWork

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WorldCat Entities in MARC records

- WorldCat Entities identifiers are included in MARC records through:
  - Export in WorldShare Record Manager
  - Export in Connexion
  - WorldCat Metadata API
  - Z39.50 Cataloging
  - Bulk output in WorldShare Collection Manager

Collection Manager

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Metadata automation tools

WorldShare® Collection Manager

- ✓ WorldCat knowledge base collections
- ✓ WorldCat cataloging partner collections
- ✓ WorldCat query collections
- ✓ WorldCat updates
- ✓ WorldCat data sync collections

oc.lc/get-cm

WorldCat Updates

Automatically receive updates as records change

Library Community

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Your Catalog

oc.lc/cm-updates

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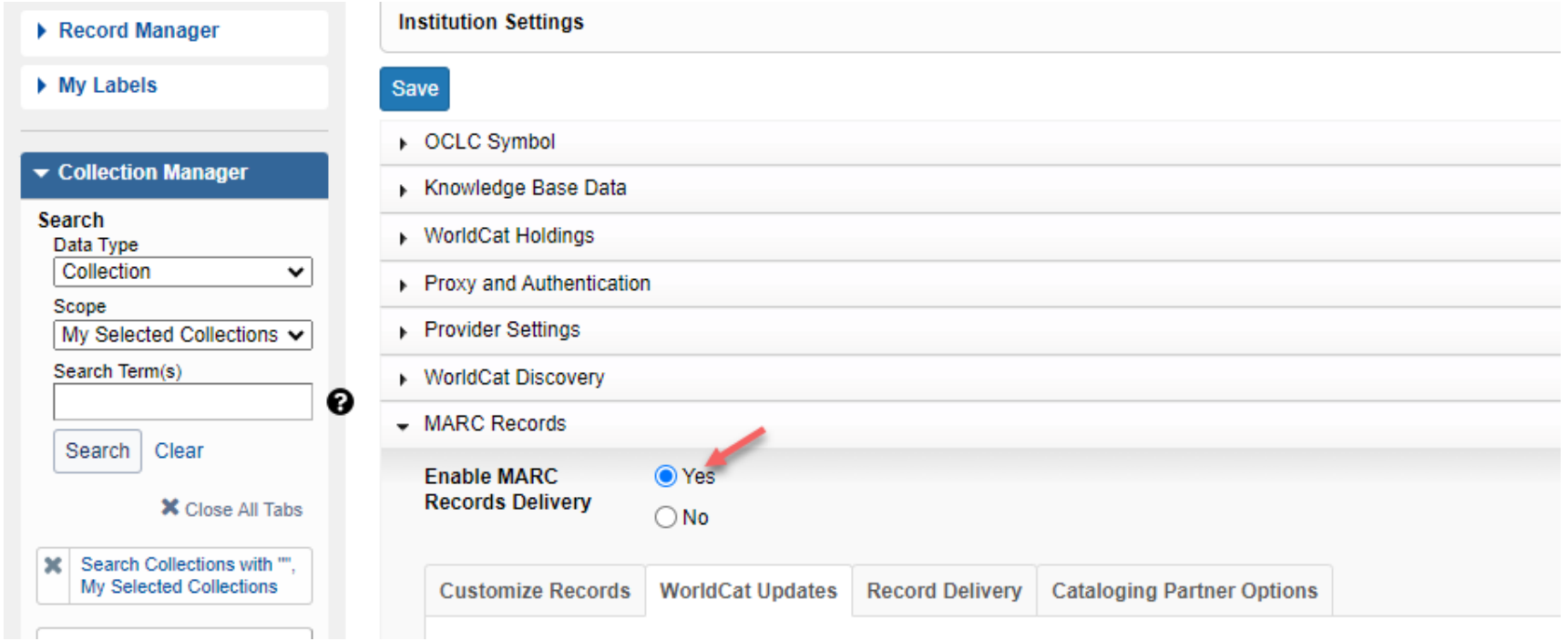
Configure WorldCat Updates



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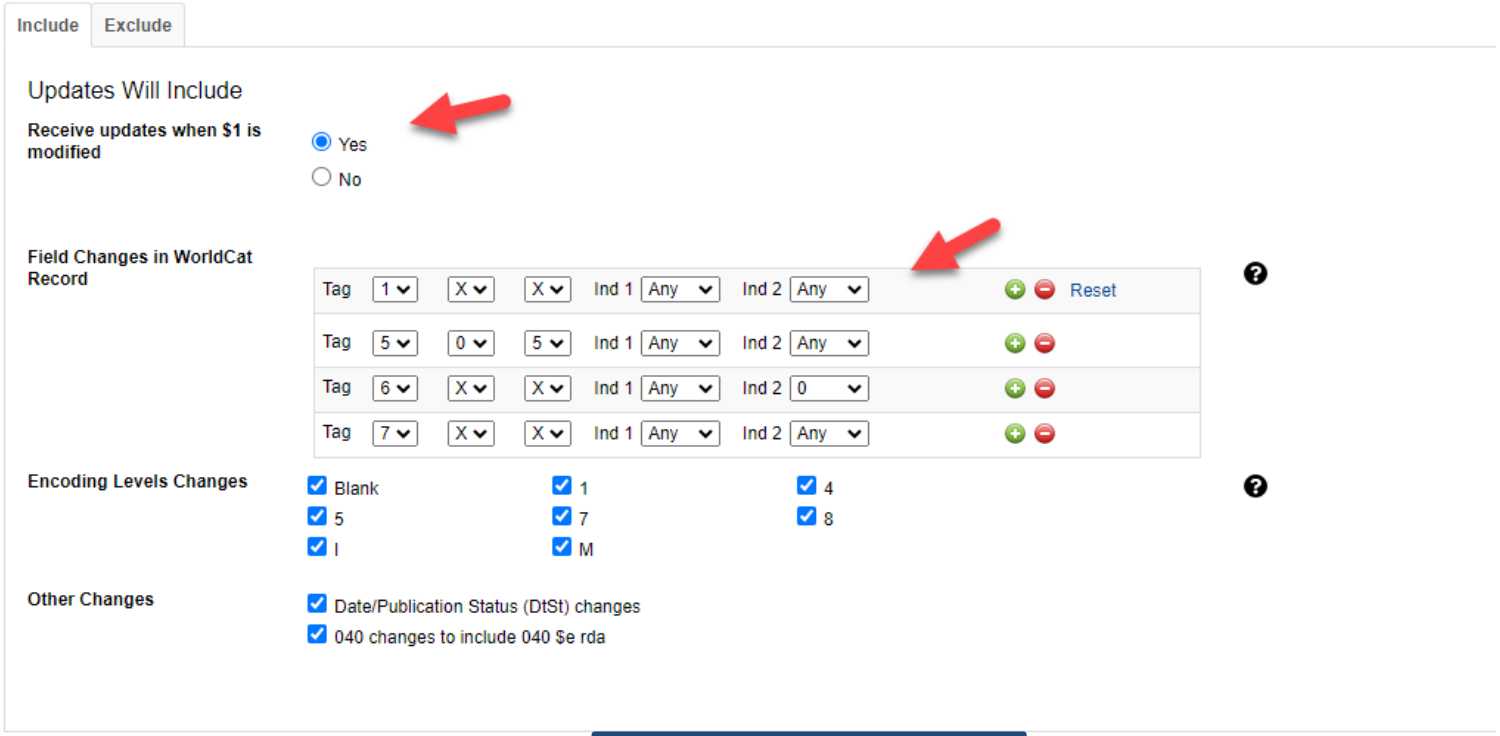
oc.lc/cm-updates

OCLC

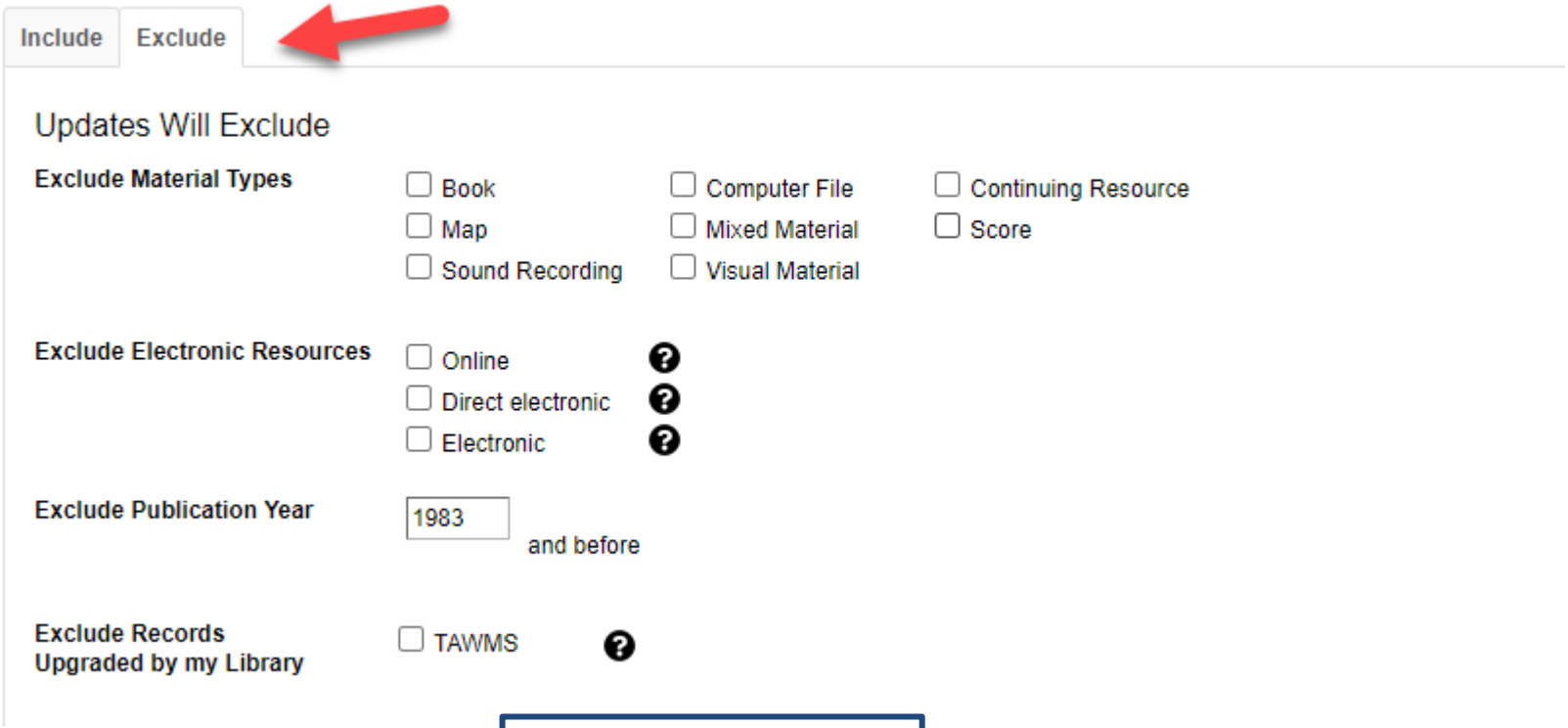
Configure WorldCat Updates



oc.lc/cm-updates

OCLC

Configure WorldCat Updates



oc.lc/cm-updates

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WorldCat Query Collections

New titles added
by your library?

Your holdings?
By format?
By date?

Subject-specific serials, books
or journals?

All records for
a specific subject today,
and new titles?

oc.lc/cm-query

Sample expert searches:

li:fga [all records with FGA holdings]

li:fga AND mt:dvv

li:fga AND mt:sco AND yr:2010-

l4:fga [for records with LHRs]

su: subject AND (mt:bks OR mt:dvv)

---

oc.lc/indexes

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Metadata automation tools

WorldShare® Collection Manager

- ✓WorldCat knowledge base collections
- ✓ WorldCat cataloging partner collections
- ✓ WorldCat query collections
- ✓ WorldCat updates
- ✓ WorldCat data sync collections

oc.lc/get-cm

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WorldCat knowledge base collections

- **Simplify and automate** your electronic workflows
- **Improve the quality** of your catalog
- Make your e-resources easier to **find, share and use**
- Automatically **maintain WorldCat holdings**

How knowledge base collections works

Register your collections...

How knowledge base collections works

OCLC automatically detects...

✓ new titles

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How knowledge base collections works

OCLC automatically detects...

- ✓ new titles
- ✓ updates

How knowledge base collections works

OCLC automatically detects...

- ✓ new titles
- ✓ updates
- ✓ deletes

OCLC

How knowledge base collections works

OCLC automatically detects...

- ✓ new titles
- ✓ updates
- ✓ deletes

OCLC automatically...

- ✓ maintains WorldCat holdings
- ✓ delivers MARC records

WorldCat®

Your Catalog

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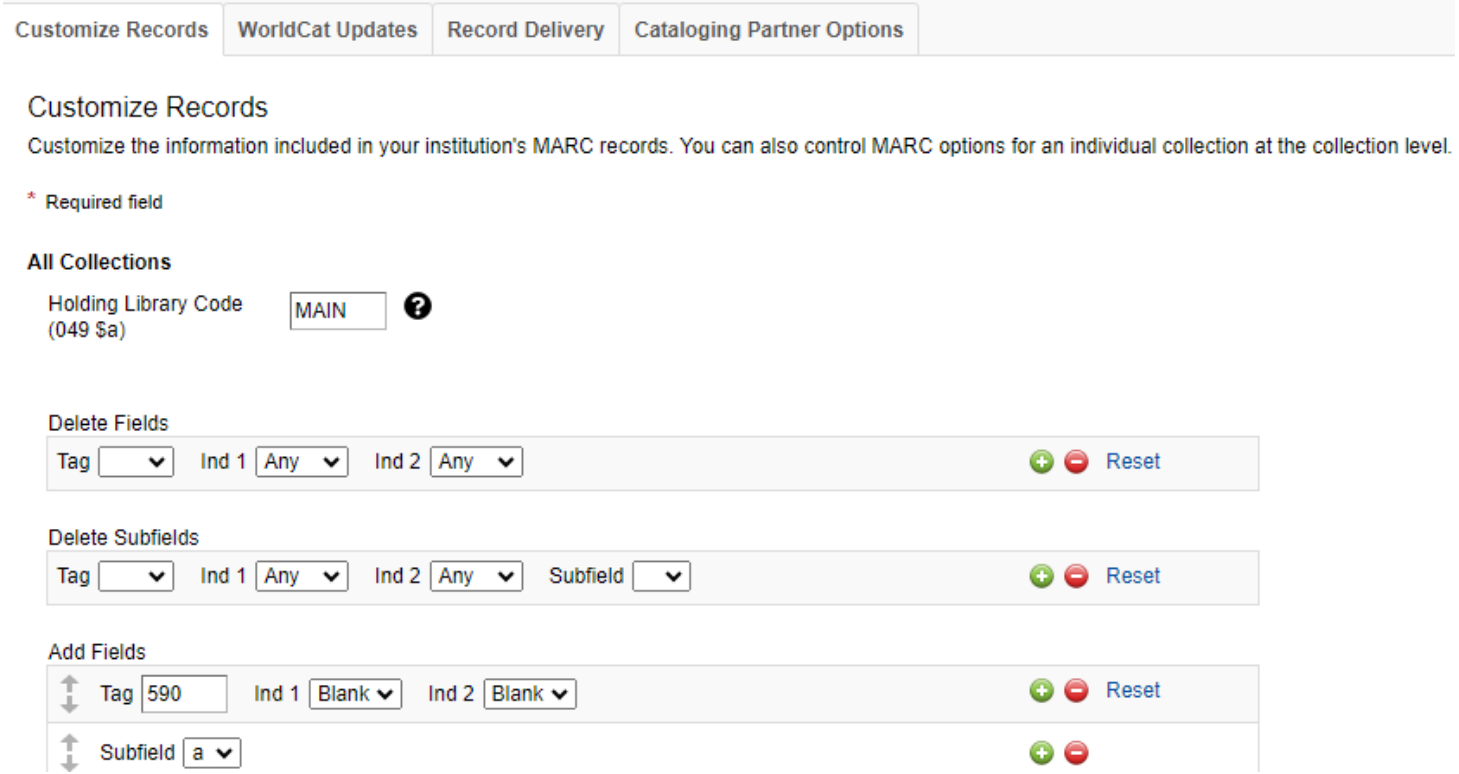
Customize Records



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What's inside our KB?

78+ million records through over
27,000+ content collections
from **674 providers**

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

EBSCO

CAMBRIDGE UNIVERSITY PRESS & ASSESSMENT

GALE CENGAGE Learning

ProQuest

WILEY

ELSEVIER

SPRINGER NATURE

Taylor & Francis Group
an informa business

JSTOR

For a complete list, visit **oc.lc/kbcollections**

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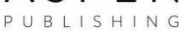
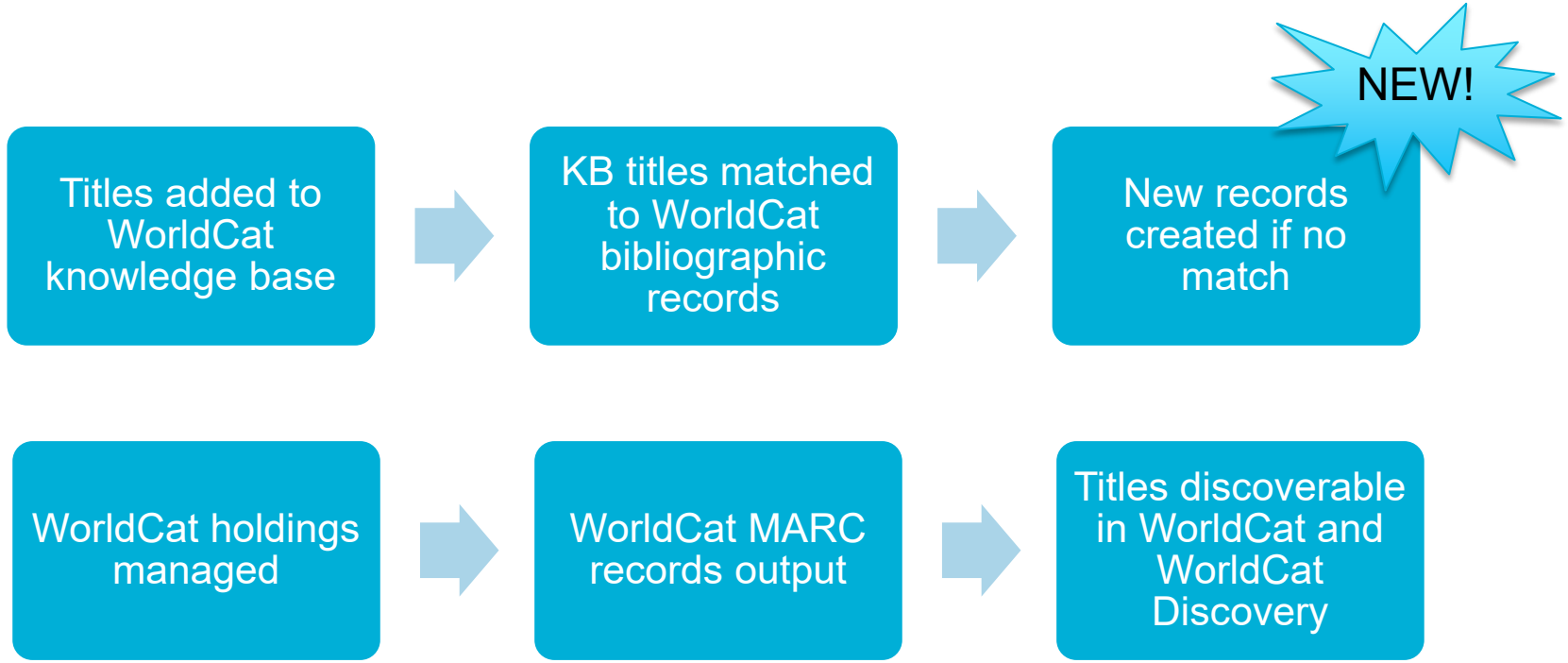
OCLC cataloged collections



#OCLCcataloging

oc.lc/cataloged-collections

Automated creation of WorldCat records



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WorldCat Updates

Automatically receive updates as records change

Library Community

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Your Catalog

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WorldCat knowledge base collections

Automate your holdings management

Future partners:

oc.lc/autoload

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Connexion browser and WorldCat Metadata API 1.x reminder

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Connexion browser

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88 days

Until Connexion browser and the CatExpress UI within Connexion browser are discontinued

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?

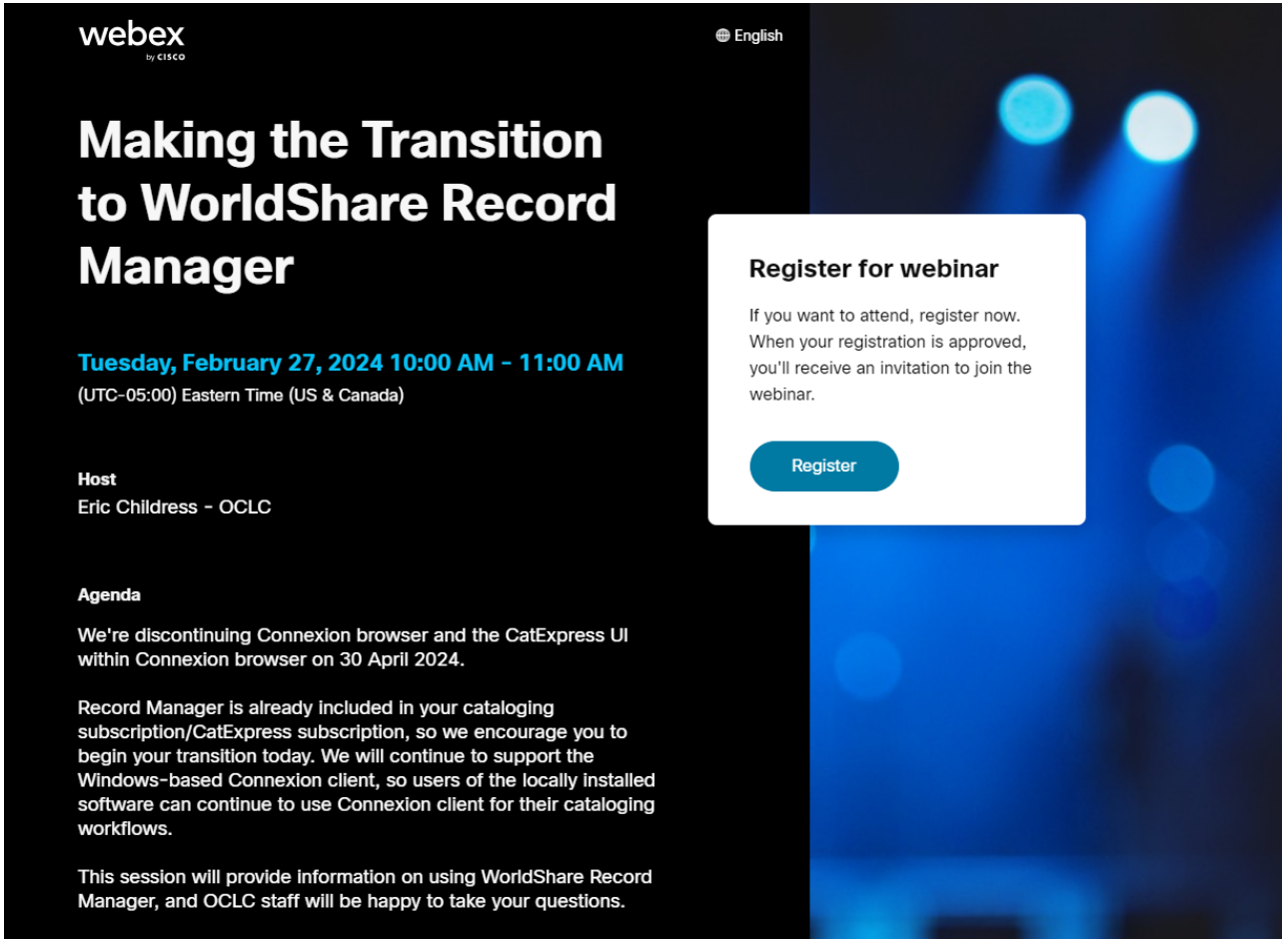
- **Work in a more intuitive and efficient cataloging environment** with improved search functionality to more easily find WorldCat® records for copy cataloging and managing WorldCat holdings
- **Better serve diverse communities** through non-Latin script data in WorldCat records
- **Locally manage staff 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, FAST, 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
- **Save file and constant data** is shared across Connexion browser and Record Manager

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

oc.lc/browser-to-rm


webex
by CISCO
English
Making the Transition to WorldShare Record Manager
Tuesday, February 27, 2024 10:00 AM - 11:00 AM
(UTC-05:00) Eastern Time (US & Canada)
Host
Eric Childress - OCLC
Agenda
We're discontinuing Connexion browser and the CatExpress UI within Connexion browser on 30 April 2024.
Record Manager is already included in your cataloging subscription/CatExpress 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.
This session will provide information on using WorldShare Record Manager, and OCLC staff will be happy to take your questions.
Register for webinar
If you want to attend, register now. When your registration is approved, you'll receive an invitation to join the webinar.
Register

WorldCat Metadata API 1.x

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What you need to know and how we will support you?

- We're discontinuing WorldCat Metadata API 1.x on **30 April 2024**
- We encourage you to upgrade to WorldCat Metadata API 2.0 today
- Code changes are necessary
- Libraries with an existing API Key can use the same key to access version 2.0
- Technical documentation is available
- To compare functionality of versions 1.x and 2.0, refer to the functionality comparison table

Product Insights: OCLC APIs

Published on 12-Dec-2023 04:14 PM by Carly_DiVito | Updated on 10-Jan-2024 08:50 AM

During this session, we will discuss upcoming changes to various APIs, collect feedback from the community, and review changes to the OCLC Community Center.

Product Insights: OCLC APIs
Date: 08 February 2024
Time: 11:00 am – 12:00 pm EST (UTC -5)
Register now

This virtual event will be recorded and posted in the OCLC API Community. All registrants will be sent a link to the recording after the event.

Product Insights

OCLC APIs

Featured Guests

KarenCoombs
OCLC staff · Contributor

Starts: Thu, Feb 8, 2024 11:00 AM EST
Ends: Thu, Feb 8, 2024 12:00 PM EST

https://oc.lc/register-oclc-apis-product-insights-feb24

Add to Calendar

0 Kudos

Comment

OCLC Update

Please enter questions in chat and send to **everyone**

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Final notes

Recordings, slides & links

- Watch your email
  - Webex email
  - Listservs
- OCLC will post links to content in the Cataloging & Metadata community

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Final notes

Recordings, slides & links

- Watch your email
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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

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OCLC cataloging community meeting

thank you

Stay in touch

Regional offices:

oc.lc/offices

Community Center:

oc.lc/community

Thank you

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community meeting

thank you

And thank you to our community!

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community meeting

The OCLC cataloging community meeting

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