The OCLC cataloging community meeting

2 FEBRUARY 2024
Welcome back

David Whitehair
Director, Metadata & Digital Services
OCLC
Today’s schedule

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

• OCLC update
• Open questions
• Closing
Linked data
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
‘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
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
Jeff Mixter

Entity ID: E39PBtJlykHh8gwxXj3JQ4cyd
Entity Type: Person
Description: product manager at OCLC

Key Information

<table>
<thead>
<tr>
<th>Language of Content</th>
<th>Entity Label</th>
<th>Description</th>
<th>Aliases</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>Jeff Mixter</td>
<td>product manager at OCLC</td>
<td>2</td>
</tr>
<tr>
<td>German</td>
<td>Jeff Mixter</td>
<td></td>
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</table>
Entities workflows
OCLC Meridian

• Create a new Organization entity
OCLC Meridian

• Immediately access a linked data URI
OCLC Meridian

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

- Find other connection points in the WorldCat graph
OCLC Meridian

• Connect them back to the new entity

Add Related Person or Organization

Relationship

Educated At

Entity Label

the ohio state

The Ohio State University
E39QjHt4mqDQXwXHPc6vjBPHJ7
A public land-grant research university in Columbus, Ohio.
OCLC Meridian

- Rich and meaningfully connected graph of data to serve library workflows
BIBFRAME workflows
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
## Virtual AskQC Office Hours

<table>
<thead>
<tr>
<th>Month</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb</td>
<td>The Lifecycle of a CIP record</td>
</tr>
<tr>
<td>Mar</td>
<td>Music Score Cataloging for the Uninitiated</td>
</tr>
<tr>
<td>April</td>
<td>PCC and OCLC: Overview and What's New</td>
</tr>
<tr>
<td>May</td>
<td>Who's Your Audience? Ways to Record Audience in Bibliographic Records</td>
</tr>
<tr>
<td>June</td>
<td>Customizing MARC Record Delivery with Collection Manager</td>
</tr>
</tbody>
</table>

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

#OCLCcataloging
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/E39Qhp4vBbhpRH9XvjbfDFXtxhb

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/E39PBJhpHr4yrM87p4BrDHjYP
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
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
Metadata automation tools

WorldShare® Collection Manager

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

#OCLCcataloging
oc.lc/get-cm
WorldCat Updates
Automatically receive updates as records change

Library Community

oc.lc/cm-updates

#OCLCcataloging
# Configure WorldCat Updates

## Updates Will Include
- Receive updates when $1 is modified
  - Yes
  - No

## Field Changes in WorldCat Record

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Tag</th>
<th>Ind 1</th>
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<tbody>
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<td>✔</td>
<td>✔</td>
<td>5</td>
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<td>✔</td>
<td>7</td>
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<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Encoding Levels Changes
- Blank
- 1
- 5
- 7
- I
- 4
- 8
- M

## Other Changes
- Date/Publication Status (D1St) changes
- 040 changes to include 040 So rda

[oc.lc/cm-updates](http://oc.lc/cm-updates)
Configure WorldCat Updates

Include Exclude

Updates Will Exclude

Exclude Material Types
- Book
- Map
- Sound Recording
- Computer File
- Mixed Material
- Continuing Resource
- Visual Material

Exclude Electronic Resources
- Online
- Direct electronic
- Electronic

Exclude Publication Year
- 1983
and before

Exclude Records
- TAWMS

oc.lc/cm-updates
WorldCat Query Collections

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)`

Subject-specific serials, books or journals?

New titles added by your library?

Your holdings?
By format?
By date?

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

#OCLCcataloging
Metadata automation tools

WorldShare® Collection Manager

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

#OCLCcataloging

oc.lc/get-cm
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
How knowledge base collections works

OCLC automatically detects...

- new titles
- updates
How knowledge base collections works

OCLC automatically detects...

✓ new titles
✓ updates
✓ deletes
How knowledge base collections works

OCLC automatically detects...

- new titles
- updates
- deletes

OCLC automatically...

- maintains WorldCat holdings
- delivers MARC records
Customize Records

Customize the information included in your institution’s MARC records. You can also control MARC options for an individual collection at the collection level.

* Required field

All Collections

Holding Library Code (049 $a)

Main

Delete Fields

Tag  Ind 1  Ind 2

Delete Subfields

Tag  Ind 1  Ind 2  Subfield

Add Fields

Tag  Ind 1  Ind 2

Subfield
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

For a complete list, visit oc.lc/kbcollections
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!
WorldCat Updates

Automatically receive updates as records change

Library Community

OCLC

Your Catalog

#OCLCcataloging

oc.lc/cm-updates
WorldCat knowledge base collections
Automate your holdings management

Future partners:

#OCLCcataloging

oc.lc/autoload
Connexion browser and WorldCat Metadata API 1.x reminder
Connexion browser
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
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
Making the Transition to WorldShare Record Manager

**Tuesday, February 27, 2024 10:00 AM - 11:00 AM**  
(UCT-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.
WorldCat Metadata API 1.x
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.

### Featured Guests

KarenCoombs  
OCLC staff - Contributor

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


Add to Calendar

#OCLCcataloging
OCLC Update

Please enter questions in chat and send to everyone

#OCLCcataloging
Final notes

Recordings, slides & links

• Watch your email
  – Webex email
  – Listservs

• OCLC will post links to content in the Cataloging & Metadata community
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
Stay in touch

Regional offices: oc.lc/offices

Community Center: oc.lc/community
Thank you
And thank you to our community!
The OCLC cataloging community meeting

2 FEBRUARY 2024