

OCCL Cataloging News and Updates

OCCL Product Updates: Connexion Client and Record Manager

Presentation summary

David Whitehair, Director Metadata Services, gave an overview of Connexion Client 3.0, to be released in the July/August timeframe. Items covered include changes of note, user interface changes, decommissioned features and using the term “WorldCat record” rather than “Master record.” The second half of the presentation covered WorldShare Record Manager, a modern, user-friendly interface. As well as an overview with screen shots of searching, focus was given to Authorities and the types available for cataloging.

OCCL Cataloging Updates

Presentation summary

OCCL Metadata Quality staff shared OCCL news and updates as well as answered questions related to the topics.

Jay Weitz, Senior Consulting Database Specialist, gave updates on recent installations and releases, and ongoing Metadata Quality Programs:

- 1) [WorldCat Validation release notes, April 2021](#)
 - a) New MARC codes
 - b) New ISSN Centre Codes
 - c) Bug fixes related to Authorities, etc.
- 2) [WorldShare Record Manager Release, May 2021](#)
 - a) New features
 - b) New enhancements
 - c) Bug fixes
- 3) Other Recent OCCL Product Releases: details for all are available in the OCCL Librarians’ Toolbox [“Release Notes” page](#).
- 4) Member Merge Project (MMP) [{VAOH June 2019}](#)
 - a) 53 participating institutions have merged 88,881 sets of duplicate bibliographic records
 - b) We are seeking libraries that would like to participate; single requirement is to be a member of the Program for Cooperative Cataloging (PCC)
- 5) [REALM Project 2021](#)
 - a) New publication from Battelle

Robert Bremer, Senior Consulting Database Specialist, gave an update on Connexion Client Macros and LCSH, covering pro-active work being done by OCCL Metadata Quality, including:

- 1) Use of macros for automating repeated actions/changes
- 2) Periodical search/retrieval to fix problematic records
- 3) Ongoing work to eliminate offensive terms that are no longer part of LCSH
- 4) Manual efforts to repair incorrectly constructed LCSH headings

Charlene Morrison, Database Specialist II, gave an update on the project to eliminate OCLC defined [Encoding level](#) codes I, J, K, and M in favor of MARC 21 codes. In January 2021, OCLC began to convert encoding level K to blank, 7, or 3 in WorldCat records. Staff have changed about 7 million of the 26 million records via macro as of June 1st along with other potential corrections and enhancements in those records. Encoding levels I, J, and M remain to be done in the future. Details: June 2020 VAOH: Updates on OCLC encoding levels (oc.lc/askqc)

Shanna Griffith, Database Specialist II, gave a brief overview of the Virtual AskQC Office Hours (VAOH) held twice a month. OCLC Metadata Quality staff present on cataloging topics, followed by a Q&A session. Recordings, slides, Q&A from past sessions, and registration for future sessions can be found at oc.lc/AskQC. This month's topic, The evolution of a WorldCat record, provided a look at forthcoming matching and merging documentation by highlighting the different flows and processes a bibliographic record may go through once obtained by OCLC.

Member Questions

Question: Will the save file be preserved when updating to the newer version of Connexion Client?

Answer: Save file will be preserved just as it is right now.

Question: How will changes to macros in Connexion 3.0 affect non-OCLC macros (for instance, Cyrillic transliteration)? Will they also be automatically moved or converted?

Answer: All of the macros, both your local macros and the OCLC-created macros will be copied and converted. The only thing that we are moving is the location of where macros are stored.

Question: Will macro help feature within the macro editor be revamped?

Answer: There are no changes to the actual macro editor or macro help. And your locally created constant data stays exactly the same.

Question: Is there a replacement for metadata extraction?

Answer: No, it will not be replaced. When we evaluated the usage of it, we found it was something that was used early on but then dropped off so much that we decided not to, to replace it.

Question: When using the new Connexion Client, will the shortcut keys still be available?

Answer: Yes, Connexion will continue to have shortcut keys.

Question: How can I get new [WorldShare Collection Manager logons](#) for new employees?

Answer: Collection Manager is set up so that your local administrator can add accounts without contacting OCLC. [Add services and manage staff accounts](#) covers provisioning for WorldShare accounts.

Question: Why have LC's children's headings never been verifiable in MARC records?

Answer: The LC subject headings for children's literature, or, [Children's Subject Headings \(CSH\)](#) that exist are a very small set and they are usually cases where the Children's version of a heading differs from the regular LC Subject Heading (LCSH). Otherwise LCSH would be used when they are needed as Children's Headings. Trying to potentially control CSH poses difficulties for us because there are different authority files that come together that must be used to add CSH to a bibliographic record. So, CSH has not been controllable. It's not on the horizon for us as something that we would try to control anytime soon, realizing that we do have the same issues there, in terms of making sure that the headings remain up to date. We've also recently realized that we have lots of juvenile headings that are CSH that have subdivisions like juvenile literature, which they should not. In many of those cases the indicator was just wrong, it needed to be a 0 rather than a 2nd indicator 1, for example. However, we're looking into fixing a lot of those so we're giving more attention to CSH than we have in the past, but we're not to the point where we have any kind of controlling of Children's Subject Headings.

Question: Will there ever be a project to address the author entries in e-book records that are often in unauthorized or incorrect forms?

Answer: That is really just a symptom of a greater problem of authority control when it comes to name access points and bibliographic records. Knowing that a lot of eBook data in particular starts off in other schemes a lot of it comes from the publishers of the book material directly as well. There are lots of issues with headings being out of step, which of course, makes it difficult to identify them and associate them with identifiers needed for linked data in the future. We've had discussions for the need of various kinds of global heading correction projects, so, it's on our radar, though we don't have a perfect solution for any of it at this point.

Question: Can you repeat the implementation timeline for Connexion 3.0?

Answer: The new version will come out either in July or August. Then the end of life of the older versions will be *sometime* in 2022, we're not sure when yet, but we'll give a minimum of 3 months' notice.

Question: What was the impetus behind adding all the subject thesauri--[MeSH](#), [RVM \(Répertoire de vedettes-matière\)](#), etc.? What improvement do you expect by doing this?

Answer: The purpose of this project is to help enrich our records with vocabularies that our other communities are using, particularly RVM that French speakers may be searching on. It's a way for us to help enrich these records so that different kinds of libraries have better access to their materials. It's a small change overall but sets up the future for possibly doing other things with those Authority headings. The specifics for those authority headings, LCSH, MeSH and RVM is because the RVM authority records have those equivalencies built into their authority structure and 7XX fields. We are able to take that information and provide this enrichment without using Google translate or things like that. We're taking what a cataloger has put into the RVM authority records and are adding that to our bibliographic records. That was part of the reason behind this project.

Question: There's a question here about changing the term “master record”. Which bibliographic records are not WorldCat records? Is it OK to call it the OCLC record?

Answer: The short answer is that any record within WorldCat that has an OCLC number (OCN) is now called a “WorldCat record.” <https://www.oclc.org/en/about/diversity-and-advancing-racial-equity.html>

We do prefer “WorldCat record,” so OCLC is the company and WorldCat is the bibliographic database, so you will hear OCLC staff use WorldCat record.

Question: Have there ever been requests to stop changing “Lawyers—Fiction” to “Legal stories?” Often the story contains a person who is a lawyer, and it is not a legal story.

Answer: We've seen that kind of discussion on some of the listservs before, because there are a number of headings that are sort of similarly structured where it is a cross-reference on an existing authority record, like legal stories, or Western stories or Christmas stories. We've talked about these and what it means in terms of is that other heading really legitimate, does it mean something different? But we haven't gotten past that. It may be something that needs to be taken to Library of Congress to say, hey, this is a different concept it shouldn't be a cross-reference, if it is really that situation.

That is to say, since Lawyers\$Fiction is a 450 on Legal stories, LC would need to update the authority in order for that to happen.

Question: Can you tell us again what is the recorded documentation for the change from K/M to blank, 7, etc.?

Answer: You can view the original recording where we made the announcement about updating record encoding levels on the Virtual AskQC Office Hours (VAOH) at oclc.org/askqc. At the bottom of the page there's a link to [Previous AskQC office hours](#), scroll down to the June 2020, it's called Updates on OCLC encoding levels, and both recorded presentations are there along with the Q&A, and presentation slides. All the documentation is there.

Question: What is the reason for changing the K / M values to 7, 3 ...

Answer: For several years at OCLC we have been working to bring [OCLC-MARC](#) into line with [MARC21](#). In other words, we want to eliminate, as much as possible, exceptions between MARC21 and OCLC-MARC. The fewer exceptions, the better interoperability of MARC records between different library systems. Encoding level values is one of those exceptions between MARC 21 and OCLC-MARC. For encoding levels, our specific goal is to eliminate OCLC defined codes and implement standard MARC 21 codes. There have been extensive discussions surrounding this. We've had lots of conversations both with internal OCLC staff in various areas and with catalogers from member libraries.

Question: I am curious for when K/M/I will be officially considered obsolete. The current wording in [OCLC Bib formats for the Fixed Fields](#) says it will be considered obsolete 'in the future'.

Answer: We don't have a definite date as it depends on how quickly we can convert the records and on what decisions will need to be made for analyzing the other types of records. Some of them, especially M, will be around for some time to come. There's quite a bit of work to do as the vast majority of WorldCat records are Encoding level M and there's a lot to consider before we change them. We want

to take a conservative approach to editing and not change things that we can't reliably change automatically.

Question: Question: How will batch-loaded records be identified after M goes away?

Answer: We have been talking about that in the last couple of weeks. We've received feedback during some sessions with libraries that they still want to see some indication that a record had been added to WorldCat through a batch-load process, rather than being input, directly, online. Presumably, some libraries make use of that information, even though encoding level M is not really any kind of indication of fullness or completeness of a record in any way. We are thinking about potentially moving that information to Field 936, information pertaining to batch-loading, from the top of the record down to the bottom. We're still in some initial discussions about how to handle that. But it is a field that we already have available and can make use of what is really just administrative information.

Question: How will [LC's adoption of RDA 2.0](#) affect WorldCat and in particular, Bib Formats & Standards? Is there a timeline for implementation?

Answer: One of the things that will need to happen in Bib Formats & Standards has to do with the references that we have on many fields to particular instructions in the older version of RDA. Those references will become obsolete and need to be updated to reflect the later version of RDA.

Question: Is there a place to see updates to DDC besides what [WebDewey](#) offers? I like the [EPC Dewey](#) exhibits, but those are proposals, not actually approved changes.

Answer: Yes, the official place is within the [WebDewey interface](#) if you don't have access to that you can glean information from the [Dewey Blog](#).

Question: The [Authorities/Create templates](#) that appear now in Connexion for creating new NACO authorities default to "Rules=c" and omit \$e rda. Will these defaults be updated?

Answer: We've actually already done this. You can change the settings in Connexion Client under Tools – Options – RDA. There are 2 boxes to choose to use RDA Workforms for bibliographic records and/or authority records. This was done as part of one of the routine automatic updates to the Client. However, it is important to remember that LC moved to RDA a number of years ago so all NACO work must be done under RDA rules.

Question: How we can find a list of obsolete LSCH?

Answer: [Lists of new and changed subject headings are posted on the Cataloging and Acquisitions Web site](#) as they are approved. Cancelled and changed headings are posted monthly: <https://classweb.org/approved-subjects/>

Question: Wondering about the migration of [Local Holdings Maintenance](#) for serials on the web version of Connexion. I remember checking this as some kind of pilot a few years ago and the data didn't make sense. Any improvements there?

Answer: Yes, there have been significant improvement with both the Connexion Browser and Record Manager. We encourage you to explore them both.

Question: I'm surprised that this "metadata" meeting has been only about MARC cataloging. I'd love to see the "silos" disappear between cataloging/quality control and Collection Manager/kb.

Answer: Agreed. And I think these silos are breaking down. We've been primarily focused on MARC updates with this. Part of that is because the US library community, and those that OCLC works with tend to work with MARC. But we absolutely recognize the need that there's so much more in describing materials outside of MARC: special collections, archives, museums, and even with e-resources. We do have staff within Metadata Quality who work with e-resources, not just MARC records, but within the knowledge base and Central Index as we look at some of the articles and stuff in there. But it's a great comment about metadata not being limited to MARC cataloging.

Question: Any updates on the upgrade for Collection Manager and the knowledge base?

Answer: We do have changes coming; we expect to announce specifics in July.