

## 2019-04-10 VAOH Session

### Presentation summary

Rick Newell presented on the topic of the OCLC training resources. OCLC offers a number of training resources to help our member libraries achieve effective use of our products and services, including online and recorded instructor-led training; point of need tutorials and exercises; and supplemental training resources designed to help build foundational skills. Visit <https://help.oclc.org/> for additional information.

URLs mentioned during the presentation:

- Home page for all OCLC Support: <https://help.oclc.org/>
- WorldCat Knowledge base collections tutorial video: [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Training/060Video\\_tutorials](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training/060Video_tutorials)
- Supplemental training resources: [https://help.oclc.org/Librarian\\_Toolbox/Supplemental\\_training\\_resources](https://help.oclc.org/Librarian_Toolbox/Supplemental_training_resources)
- LC/PCC Catalogers Learning Workshop (CLW) training materials: <https://www.loc.gov/catworkshop/>
- ALCTS Fundamental Courses: <http://www.ala.org/alcts/confevents/upcoming/webcourse>
- OCLC's Librarian Toolbox: [https://help.oclc.org/Librarian\\_Toolbox](https://help.oclc.org/Librarian_Toolbox)

### Member questions

#### **What are the differences again between Connexion client and browser classes?**

Answer: Differences between client and browser: Connexion client is software you can download from OCLC's website and install on your computer. It has more functionality for automating things, batch processing, etc.

Connexion browser is a website you can log into and you can do all of your cataloging on the website without installing any extra software on your computer.

So, the Connexion client classes cover the mechanics of how to use that interface and the Connexion browser classes cover the mechanics of how to use that interface.

#### **Is the information in the WorldShare Record Manager policies different than what is in BFAS [Bibliographic Formats and Standards]?**

Answer: No, it's not. In fact, we refer heavily to Bibliographic Formats and Standards in the policies classes, so it's really an amplification, an illustration of how to apply the policies in Bibliographic Formats and Standards.

#### **What are the differences between Expert Community and Database enrichment?**

Answer: Database enrichment has been around since 1991, enabling full mode and higher authorizations to add subject headings and call numbers to records. Additional capabilities were added to Database Enrichment in subsequent years, including: fields 006 and 007, 300 physical description fields to CIP records, 505 contents notes, upgrading any CIP record except for its Encoding Level value of 8.

The Expert Community was created in 2009, expanding upon Database Enrichment by enabling full-mode and higher users to edit most fields in most records. The complete list of fields that may be added if not present, added even if already present, and edited if present to non-CONSER PCC records under the capabilities of the Expert Community can be found in *Bibliographic Formats and Standards*, [Chapter 5.2](#), under the heading “Enriching PCC Records.” If you try to add a field that is not on that list, then you will get an error message when you try to replace the record.

### **Is the OCLC training free?**

Answer: Yes, all of the OCLC training is free. You do need to register for it, but there is no charge. The training we link to for other organizations may or may not be free. The Library of Congress training is free, but the training from ALCTS is not free.

### **Our DSpace repository is harvested via OAI-PMH. If I should change any of those records would the changed be overwritten next harvest?**

Answer: Your DSpace repository is profiled by a collection manager at your institution using the WorldCat Digital Collection Gateway. Records are periodically harvested from DSpace and copied to WorldCat.

There are two factors that affect your ability to edit a record in WorldCat without fear of it being overwritten by subsequent Gateway harvests. The first is in your control and the other is in the control of your collection manager.

If you edit a record in WorldCat and raise its encoding level above K, then the Gateway will never touch that record again even if it is enhanced or deleted from your repository. That’s in your control, but you’ll want to do that only in coordination with your collection manager.

The other mechanism is in the collection manager’s profile choices in the Gateway. The collection manager uses the instructions to [Prepare a collection for the Gateway](#) to set up the profile for your repository. One key setting that makes a difference to your edits is whether or not they’ve changed the default, **Replace All**, WorldCat Record Processing setting to **Add New Only**. If they’ve selected Add New Only, then you’re free to edit records that appear in WorldCat without fear of them being overwritten.

### **How do you qualify for Expert community?**

Answer: If you have a full-level authorization or higher and can breathe, you are a participant in the Expert Community. No additional qualification is necessary.

**Sometimes LC has started a record, but not finished it. Should we upgrade the record? It seems the records are anyway overlaid later if/when LC finishes the record. Also, sometimes their upload ends up resulting as a duplicate record if we have worked on their record.**

Answer: Go ahead and upgrade the record as you need it to be complete for your catalog. There isn't a reason why you should not do that. It may end up causing a duplicate record to be added later if the data does not match exactly, but we will try to catch that using the various tools that we have, such as DDR.

**Does OCLC currently do any ongoing maintenance of 776 fields? E.g., update \$w OCNs for merged records?**

Answer: For the longest time, we have not done anything with 776 fields, and this is true of many linking fields, where when a record is merged, the control number referenced in that linking field is not updated to point the current record. Of course, you can still search that number, but the number that you search may be in the 019 of that related record. It would be a useful thing to update the control numbers in these linking fields. We have started investigating that and will hopefully expand what we do so that we can get rid of duplicate 776 fields. Sometimes you'll notice on records that there will be two or more occurrences of a 776 field for an ebook version that point to different control numbers, but several ebook records have been merged into one. We only need one 776 field in that case rather than 3. We're looking into ways to get this data up-to-date.

**I would like to see training on the Connexion Digital Import function or if there is something in WorldShare Record Manager for uploading to CONTENTdm.**

Answer: Thank you for that feedback. We will take that into consideration.

**Are there comparable options to edit WorldCat records for non-English cataloging communities?**

Answer: For those who catalog in languages other than English, the Expert Community and all of the other--minimal-level upgrade, database enrichment--they apply to those records as well, so someone who is cataloging in a non-English language, they can edit records in their language--there's no separate program for that.

**Are there non-English versions of the training videos, etc?**

Answer: To a limited extent, yes. For example, if you go to the WorldShare Record Manager [training page](#), at the bottom, there is a link that says, "For WorldShare Record Manager training in French, please [click here](#)." You will find some videos about Record Manager. We don't have a lot of non-English training content, but we are working to get more.

**How crucial is it to update things like access point forms in linking fields? Example: the NAF form of an author's name changes, when doing BFM, update all linking fields as well? For future 776 fields updates, is it possible to also update the \$a when the authorized form of a name has changed?**

Answer: It would be really nice if those were all updated, but it's not crucial that they all are. Hopefully, down the line, ideally OCLC would make use of the control numbers in pointing to another record and

make use of the data in that record, rather than having to manually entering data into a linking field and then having to separately maintain it. We have done some maintenance on headings in linking fields in the past. For instance, when we have gone through the database to update AACR2 forms to be compliant with RDA, so if we have an author where it says "died", we were going to change that to a hyphen and a date. We did that in linking fields as well. But routine maintenance of those where the heading changes, doesn't happen unless catalogers go in and manually maintain it. It's just a citation, so if it's a little bit off, it's not the most critical kind of thing, but it's up to catalogers to maintain those.

BibChange does receive requests for BFM, to update these headings, and when QC staff works on that, they also update linking fields to reflect the current form. So, you could submit a request to [BibChange@oclc.org](mailto:BibChange@oclc.org) and we will do that for you.

**Since April 8 there is a new PCC policy concerning the end-period. What are the implications for non-PCC libraries? Are they supposed to continue the former policy?**

Answer: At this point, you could follow PCC practice and omit the periods, which actually is the easier thing to do, because if you are familiar with MARC 21 documentation, and what we've also included in BFAS, some fields traditionally had a period added on to the end and other ones do not. It's kind of hard to remember which ones fall into what category, so it's generally easier to not include the period. However, at this point, you can continue with the practice of entering the periods and that's not a problem.

**Could OCLC give training/instructions on working with very complex searches (in Record Manager)? When using many different indexes (for both bib records and LHRs) and operators, we often get unexpected results: too many or too few.**

Answer: We do have 2 videos on searching in Record Manager, Basic and Advanced Searching. Having said that, those videos are probably not going to address your specific questions about very complex searches. If you have a search that isn't giving you the results you want, send your question to [support@oclc.org](mailto:support@oclc.org), or call the toll-free number, 1-800-848-5800, and someone can help you with that search.

**What does leaving out the end periods do with the presentation in WMS and Discovery?**

Answer: It doesn't have much of an impact because the bibliographic data in so many of these displays is taken from the MARC record and labelled, so there's a caption and the data, the lack of a period at the end is probably not going to affect somebody's ability to understand what they are seeing.

**I would appreciate training on WebDewey and its number building feature.**

Answer: We have some training on WebDewey, although we have not offered a training course in the recent past. An older introduction to WebDewey is available at [https://help.oclc.org/Metadata\\_Services/WebDewey/WebDewey\\_training](https://help.oclc.org/Metadata_Services/WebDewey/WebDewey_training). In addition, ALCTS has a video on WebDewey Number Building Tips and Tricks at [https://www.youtube.com/watch?v=W\\_9DzlwUSYo&t=595s](https://www.youtube.com/watch?v=W_9DzlwUSYo&t=595s).

**When PCC refers to terminal punctuation are they referring only to periods, or to all ISBD punctuation between subfields?**

Answer: The announcement that was made recently is only referring to terminal periods, the punctuation that is at the end of the entire field, not the ISBD punctuation that separates subfields.

**When reporting duplicate bibliographic records, I often see duplicates from national libraries for the same bibliographic entity. I am not sure if I should be reporting these. Is each national library allowed to retain its record in WorldCat? For example, if there is a record from a U.S. member library and duplicates from the Australian and Canadian national libraries, which records get retained or merged?**

Answer: There should only be 1 bibliographic record representing a particular resource, per language of cataloging. There are certain situations, a hierarchy, for which record would be retained, based on the level of completeness.

**PCC members are no[w] being asked to report NACO activity to LC. Currently there is no differentiation in OCLCs stats program for NACO between name and series authorities. Is there any chance this distinction could be added to the way OCLC tracks and reports NACO work?**

Answer: That would be a useful enhancement to the participants, so we can put it on a list for future consideration.

**Regarding the new PCC policy regarding limited use of ISBD punctuation in bibliographic records (April 8, 2019) PCC libraries may stop terminal periods. What should the Desc in the Fixed Fields be, if we begin excluding the terminal periods? For non-PCC libraries, do you recommend that we also begin excluding the terminal periods?**

Answer: You would code Description in the Fixed Field as you always have, because the other punctuation remains in the record, so it's only terminal periods that you would potentially exclude. For non-PCC libraries, you may include or exclude terminal periods at this point, as you see fit.

For more information, see the PCC's Guidelines for Implementing New PCC Policy Regarding Terminal Periods in MARC Bibliographic Records are available at <https://www.loc.gov/aba/pcc/documents/guidelines-terminal-periods.pdf>.

**Are there plans to add other subject authority files for automatic verification? like lcdgt? or others? [Including] 650s with 2nd indicator 7 and \$2. For example, being able to control headings from AAT**

Answer: For those that are not currently available, we are open to exploring options to increase the number of thesauri available. Verification and controlling would be limited to Record Manager.

**Is there any foreign language authority file added to OCLC (for example, any spanish language naf)**

Answer: We currently load the German and Dutch name authority files, along with French names from the Library and Archives Canada, as well as Maori subject headings. These are all available in Record Manager, but not Connexion. There are no immediate plans for adding Spanish authorities, but we are open to exploring that possibility.

### **What is the state of migration to Record Manager? How much longer Connexion will survive?**

Answer: There is no set timeframe for the end-of-life of Connexion. If you catalog using Connexion, you are free to switch to Record Manager. Some of the functionality available in Connexion does not yet exist in Record Manager. On the other hand, Record Manager has some features that don't exist in Connexion. It's a matter of what works best for you, and that may be all we can really say at this point.

### **I found the concept of a named conference a little bit difficult can you explain**

Answer: For example, if you are cataloging the papers or proceedings of a conference, normally, the conference will be named on the source with an explicit name, as opposed to, well, we had a meeting where this was discussed. In the latter case, there's no formal name for the meeting.

The Library of Congress' [refresher training](#) on [Conferences](#) (updated October 2012) states:

*A named conference need only fulfill these RDA definitions*

- *RDA 8.1.2*

*Person, Family, and Corporate Body:*

*“The term corporate body refers to an organization or group of persons and/or organizations that is identified by a particular name and that acts, or may act, as a unit.”*

- *RDA 8.1.3*

*Name:*

*“The term name refers to a word, character, or group of words and/or characters by which a person, family, or corporate body is known.”*

### **Can one use both Connexion and Record Manager?**

Answer: Yes.

### **Will Record Manager be available for NACO?**

Answer: Yes, NACO institutions are currently able to use Record Manager for creating or updating name authority records. This functionality has been available since September 29, 2018.

### **Is there somewhere where the differences between Connexion and Record Manager are listed?**

Answer: We are not aware of a specific list of the differences. Record Manager is constantly being further developed, so it would be a constantly changing list. This may be something we would want to bring up with the people involved in Record Manager development, to help people decide whether they want to move their work

**Would the ALA annual conference be a "non-example" of a named conference? I.e., it would be a 110 rather than 111?**

Answer: You could have conference entered subordinately to a corporate body, but it would still have a name.

**Is record manager only online?**

Answer: Yes.

**Is there any way (aside from looking at each record) to distinguish which record have controlled vs uncontrolled headings for the same name?**

Answer: There is an index for searching controlled names, "ar:", followed by an ARN. So, for example, if you wanted English language-of-cataloging records containing "Lee, Stan" that are not controlled to "Lee, Stan, ‡d 1922-2018 (LCCN n 83169267; ARN oca00990699)", you could enter this Command Line search: na=lee, stan AND ll:eng NOT ar:990699.

**What is the status of FAST headings? Are FAST headings still considered experimental?**

Answer: We are in the process of moving FAST into a production mode as opposed to an experimental system that is centered in our Research area. So, they are not considered experimental anymore. The production mode is coming soon.

**Will FAST headings only be in English?**

Answer: Yes, as things stand right now, because Library of Congress Subject Headings have been the basis of FAST headings and those are in English.

**Can members add FAST headings? or you have to wait for the automatic processing?**

Answer: You can assign FAST headings to a record for an item you are cataloging, or if you find a record in the database.