Virtual AskQC Office Hours
Searching Connexion and Record Manager

OCLC Metadata Quality
Housekeeping

• This session is being recorded
Housekeeping

- This session is being recorded
- All session recordings, slides, and notes are available at oc.lc/askqc
Housekeeping

• This session is being recorded
• All session recordings, slides, and notes are available at oc.lc/askqc
• After the session you will be directed to a quick, optional survey
On the call today

Nathan Putnam
Director, Metadata Quality

Hayley Moreno
Database Specialist II

Bryan Baldus
Consulting Database Specialist

Shanna Griffith
Database Specialist II

Robin Six
Database Specialist II

Jay Weltz
Senior Consulting Database Specialist

Robert Bremer
Senior Consulting Database Specialist
Hi everyone! As already mentioned, Bryan and I will be discussing differences in searching bibliographic and authority records in Connexion Client and WorldShare Record Manager. You will soon find out that both systems have similar capabilities and the differences lie in how the interfaces looks, indexes, and unique features that come with each system.

For bibliographic search, I’ll discuss basic, browse, advanced, and expert searching. While Bryan will compare the searching and browsing authority records.
Basic searching in the context of this presentation is defined as searches which consist of a single term or phrase paired with an index (such as title, author, ISBN).
On the left side of the slide, we have the navigation section of basic searching in Record Manager. It uses different terminology compared to Connexion Client. The first dropdown is data type which provides you a list of record types you can search, which are: bibliographic, authorities, local bibliographic data, local holdings records, and online save file records.

The Scope drop-down list allows you to pick where you want to search, we have selected “All of WorldCat” which allows you to look for everything in WorldCat, including records that you have no holdings to. Scope can also be limited to search for records that your library has holdings to or search for bibliographic records that are in your online save file.

From the Index dropdown list, select any of the basic search indexes available.

Finally click on Search.

-----------------

On the right side of the slide, you can reach the navigation screen in Connexion client
by pressing F2, clicking on the Search WorldCat icon which has a magnifying glass, or clicking on the menu bar Cataloging--Search--WorldCat. For basic searching you would type the search term or phrase in the keyword/numeric search section in the free text under “Search for.” The index drop-down list would be right next to your search term or phrase. Select the one that you wish to search and click on “OK”
It’s worth highlighting the differences in indexes for basic search. In Record Manager we have a smaller set of indexes: keyword, title, author, ISBN, ISSN, and OCLC control number. Keyword is your catch all for anything else that you cannot search with the other indexes. The author index can search for any type of name such as corporate, personal, or meeting.

In Connexion client the basic search indexes are more specific. The minus button (which would be right next to pencil/list icon). I had already clicked on the minus button in the image captured which causes the plus sign to appear (this plus sign contains the longer list of indexes). As you can see in Connexion the basic search indexes are more specific when it comes to author (you can do a corporate or personal name), you have indexes for publisher, more indexes for standardized numbers such as LCCN and publisher numbers. In the shorter list of indexes for Connexion client you do not have the catch all keyword index we see in Record Manager.
Our next type of search is browsing which we’re defining as not looking for something specific rather just searching for general information to see what you can find in the database.
In Record Manager, you would keep data type as Bibliographic Records and change the Scope drop-down list to All WorldCat - Browse. From the Index drop-down list, select an index. All the indexes that are available for browsing in Record Manager are on the top right corner of this slide. It’s a much shorter list compared to browsing in Connexion client and all the indexes for browsing in Record Manager are also found in Connexion. One of the indexes does have a different name, the Canadian Class Number in Record Manager is the same as the NLC Class number in Connexion Client.

Based on the index you selected, enter your search terms in the Term(s) text field. The text field will expand to fit your search terms, if needed. Finally click Search. In the search results, you will not only see the specific term for which you searched (which will be bolded and have a landmark icon next to it), but surrounding terms as well (similar to Connexion). You can then click any of the results to view the associated records.
In Connexion client, to go to the browse searching interface you can do the key shortcut of Ctrl+F2, or from the Menu bar, go to Cataloging--Browse--WorldCat or click on the WorldCat icon that seems to have several boxes behind it.

Like basic searching you can minimize or expand your indexes by clicking on the (+) or (-) signs on top of the drop-down list of indexes. I have included an image of the short list of indexes for browse (on the left of the slide). When using the expanded list in browse you have about 74 indexes available.
Advanced searching is when you are looking for a detailed query consisting of multiple terms or phrases paired with one or more indexes.
Advanced searching in Record Manager will have a somewhat familiar feel to the Connexion Client search interface. Some of the limiters found in Connexion are not displayed in the search screen for Record Manager, such as internet, microfilm, and material type. The “Format” dropdown in Record Manager has a combination of the Format and Material Type dropdown in Connexion.

As usual you have a choice on what Search Scope you want, we’re continuing to use All of WorldCat. Select an Index from the list. Based on the index you selected, enter your search elements into the text field. The text field will expand to fit your search elements, if needed. Different from Connexion, you can enter up to five combinations of indexes and search elements (Connexion only has three search terms or phrases you can pair with the drop-down index list). You can click on the green Add button to have more search rows or click on the red Remove button to delete search rows. Like Connexion Client the Boolean operators are also in dropdown boxes.

It’s important to note that none of the “whole phrase” indexes, are in the dropdown list. Also, three indexes have different prefixes between the systems: corporate body is co in Record Manager vs. cn in Connexion Client; language of resource is ln in Record manager vs. la in Connexion; and finally, lccn is nl in Record manager while its...
In the Connexion Client.

Advance search also allows you to choose facets such as format, language of resource or cataloging in the beginning of the search query to have more refined results from the onset.

Click on Search when your query is complete. In order to clear the search, you must click on the bottom left corner “Reset”
In Connexion client, advanced searching uses dropdown list of indexes and can only accommodate three search terms or phrases. Although one is limited to three search elements in the “Keyword/Numeric Search” portion, on the “Command Line Search” you can string together as many index/search element combinations as you’d like (we’ll talk about this soon in expert searching). In the client you have limiters that focus more on the type of resource you have in hand such as microfilm, internet, and material type. There are 126 indexes available in Connexion Client.

To clear your last search, you would have to click on the “Clear Search” button at the bottom
Finally, the last type of searching we’ll compare is expert searching, this involves typing out the query using the prefix index labels, Boolean operators, and search elements. The user is not selecting any indexes from the drop-down list or checking off facets provided by the system.
In Record Manager, expert searching can be found using the term(s) free text box. The complete search would be in a text string query. With the use of Boolean operators, you can search through several indexes at once and apply limiters at the same time.

Boolean operators must be capitalized (unlike Connexion Client where they are not case sensitive). The whole word indexes, which usually contain three letter characters are not available nor is derived searching.
Expert searching in Connexion is better known as command line search. The image on the left contains an example of a search with index label prefixes and Boolean operators (which are lowercased since its not case sensitive).

The image on the right shows "derived" searching where segments of the words are separated by slashes or commas. A word is defined the same as for keyword searching (any character(s) between two blank spaces). The number and pattern of letters and commas tells the system which derived index to search.
I’ll like to conclude my part of the presentation with a few features that you’ll experience when searching in Record Manager or Connexion Client.
The facet feature in Record Manager differs greatly from that of Connexion. The facets will appear alongside the results of your search and you can narrow down the records retrieved by clicking on the facets you want your records to have. For example, in the screenshot above by clicking on English for Language of cataloging and year of publication 2002, the total number of results are reduced to two records.

It’s also worth noting that within your results you can see some initial information about the record: whether it has full or minimal description, and the library that first created the record. Additional information can also be viewed by clicking on the blue circle with an I.
Facets and limiters are present from the onset of the Connexion client search interface. Within the red boxes you can see that we are using the year and language of cataloging facets which are like those that we showed in Record Manager. Unlike Record Manager, you must do this before initiating your search.”
Features of results are also very different for each system. A history of all the searches performed are retained on the screen for Record Manager. Clicking on each of these searches will take you back to the results of that previous search.

Click the title of a resource or click on the edit button to view the MARC record.

Record Manager can return up to 5000 results, and displays the total number of matches.

Record Manager does have a “Group List” results option but it’s displayed differently than Connexion Client. The facets on the left show the number of records that contain that facet.
Here are examples of all the views you have for results in Connexion, which will display depending on the number of results. Brief list (are for results between 2 to 5 records), truncated list (between 6 to 100 records), and group list (101 to 1,500 records). You can also switch between brief and truncated displays by going to the menu bar, clicking on view and then list type.

Connexion can retrieve up to 1500 results; above that, the client displays a "Too many matches" message along with the total counts for each search term.

Well that’s it for my part of the presentation. I’ll now pass it on to Bryan to discuss searching authorities.
SEARCHING IN CONNEXION
CLIENT AND RECORD MANAGER: AUTHORITY RECORDS
Searching authorities

**Connexion**
- LC/NACO Name Authority File (LCNAF)
- Library of Congress Subject Headings (LCSH)
- Library of Congress Genre/Form Terms (LCGFT)
- Library of Congress Children’s Subject Headings

**Record Manager**
- Same LC-related files as Connexion
- Canadiana Name Authorities
- Canadian Subject Headings
- Integrated Authority File (GND)
- Medical Subject Headings (MeSH)
- Māori Subject Headings
- Dutch Names Authority file (NTA Names)
- More coming soon

When searching and browsing within Connexion, the only authority database available is the one containing the LC/NACO Name Authority File; LCSH; LC Children’s Subject Headings; and LCGFT.

Within Record Manager, it’s possible to search and browse each of the above-mentioned LC collections, as well as Canadiana names (with terms in French); Canadian Subject Headings (with terms in English); German (GND) names and subjects; Maori subjects; MeSH; Dutch names; with more to be added in the future, including Art & Architecture Thesaurus (AAT) later this month, and Répertoire de vedettes-matière (RVM) expected sometime in 2020.
As with bibliographic searching, the Connexion Search dialogue, which one brings up by pressing Shift-F2 or using the Authorities->Search->LC Names and Subjects menus, offers an entry box for composing a Command Line Search, as well as 5 entry boxes for composing a more guided search using drop-down indexes.

Record Manager offers similar options. However unlike in bibliographic searching, for authority searching, there is no advanced search option, so if you want to combine a set of indexes in a single query, you have to compose a command line-style query, making sure that any Boolean operators are in all-caps.
In terms of the number of records returned in a single search, Connexion presents the user with a notification message box if their search resulted in more than 100 records, but after dismissing that message, the user may page down to browse through more than 5000 results.

<click>
As noted in the previous slide, the top image shows a message in Connexion client indicating that there were more than 100 matches and explains how to view the next 100.

The bottom image shows Record Manager with a total count of 3,047,634, but a message indicating that only the first 5000 may be viewed.

In Record Manager, depending on how preferences are set, users can choose to display 4xx, 5xx, and 7xx references, in addition to 1xx fields. In Connexion, users have the option to see 4xx and 5xx references based on checkboxes in the Search window.
This image shows Connexion client's Browse window (accessed by holding alt-F2 or by going through the Authorities->Browse->LC Names and Subjects menus), displaying the list of drop-down indexes available for browsing.
In Record Manager, to get to the list of Browsable indexes shown in the previous slide, after choosing the Data Type of Authority Records, the user then chooses the Scope, or database, that they want to search or browse.

Then, the list of indexes relevant for the selected Scope appears as a separate drop-down, Index. Comparing this list against the one in Connexion, many are the same. Connexion’s drop-down lists "Musical Incipits". This is not indexed within Record Manager due to so few within LC authorities containing Incipit data. On the Record Manager side, the indexes not present in Connexion are a variety of Established Heading Linking Entry Phrases. Aside from 781, 7xx fields are not searchable in Connexion client using specific indexes. However, they are available via the keyword index.
This slide shows a browse result on Shakespeare, William, 1564-1616. Among the other names is Shakespeare Vaidya.
I should note that for this browse query, my user preferences are set to search using diacritics. If that preference is not set, the browse results more closely resemble those seen in Connexion client.
However, looking at the browse results for the same query in Connexion, Shakespeare Vaidya does not appear.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>0014256682354</td>
</tr>
<tr>
<td>008</td>
<td>990820201116666</td>
</tr>
<tr>
<td>005</td>
<td>1999082317142060</td>
</tr>
<tr>
<td>010</td>
<td>000000000000000</td>
</tr>
<tr>
<td>040</td>
<td>DLC-ON Edi ms to DLC-ON</td>
</tr>
<tr>
<td>100</td>
<td>Shakespeare, Vaidya</td>
</tr>
<tr>
<td>400</td>
<td>Shakespeare Vaidya</td>
</tr>
<tr>
<td>670</td>
<td>Project failures and sickness in Nepal, 1999: fto t.p. (Shakespeare Vaidya: MBA, MBF (Italy), LL.B. Dip. in Foren, Dip. in Rural Dev)</td>
</tr>
</tbody>
</table>

Bringing up the record containing "Shakespeare Vaidya" shows that there is no comma between "Shakespeare" and Vaidya.

Conducting a Browse on the 400 shows that Connexion files it before the "Shakespeare" headings that do include a comma.
For LC, both Connexion and Record Manager users have the ability to conduct a root and expanded browse. In Connexion, you would start by bringing up the Browse dialogue and filling in the desired term in the "Browse for:" box, and then provide an "Expanded Term:" for the term where you want to begin browsing within a term containing many subdivided records, as in this case, where we want to start browsing through William Shakespeare's titles starting at Hamlet, rather than at $xActing, which is where we would begin if we left out the Expanded term.
Record Manager's implementation of Root-Expanded is similar to Connexion's. However, the option to select LC-Root/Expanded Browse will not always be available, depending on how the User Preferences are set for "Authority Records Basic Search Preferences". If the user has checked "Enter search terms with diacritics", then only a simple browse is available.
This slide displays the top portion of the User Preferences. The main purpose of the user preferences is to customize the scope and index dropdowns by removing scopes/indexes that are not used as well as displaying them in a useful order, with the most important ones ranked to top of the list, and a default scope/index set.

So, if you don't plan on searching any authority files other than LC, you could turn the others off in preferences, and have only those related to LC appear in the Scope dropdown menu.
For additional information on searching in Record Manager, you may visit the OCLC help site shown in the first link.

Connexion client training, available at the second link, Has tutorials on basic and advanced searching in Connexion Client.

For information about available indexes in both Record Manager and Connexion see Search WorldCat Indexes in the third link.

Authorities: Format and Indexes, which comes up when you click on one of the mnemonic labels within Connexion client, covers authority indexes in Connexion. Please note that some of the information on that page is out of date, so for current information about authority record format and indexes, please the fourth link.

Record Manager: Authorities Guide describes indexes that each authority file available in Record Manager provides and the MARC tags that data is indexed from.
Questions?

Please submit questions through chat

Nathan Putnam  
Director, Metadata Quality

Hayley Moreno  
Database Specialist II

Bryan Baldus  
Consulting Database Specialist

Shanna Griffith  
Database Specialist II

Robin Six  
Database Specialist II

Jay Weitz  
Senior Consulting Database Specialist

Robert Bremer  
Senior Consulting Database Specialist
Thank you!

Send cataloging policy questions at anytime to: 
askqc@oclc.org

Session links available at: 
oc.lc/askqc

Next Virtual AskQC Office Hours:
January 2020, date TBD
Registration will be available at oc.lc/askqc