

November 13, 2019

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

The screenshot shows the OCLC AskQC website. At the top, there is a navigation bar with the OCLC logo, a search bar, and links for "Release Notes", "System Status Dashboard", and "Contact OCLC Support". Below the navigation bar is a search bar with the text "How can we help you?". The main content area is titled "Previous AskQC office hours" and includes a "Last updated: Jul 12, 2019" timestamp. The content is organized into three sections, each with a title, a list of resources (WebEx recording, Presentation slides, Summary and member questions), and a "Table of contents" sidebar on the right. The sections are:

- May 8, 2019 :: Small errors with big consequences**
 - WebEx recording
 - Presentation slides
- April 10, 2019 :: An overview of OCLC training resources**
 - WebEx recording
 - Presentation slides
 - Summary and member questions
- March 13, 2019 :: Intro to the Virtual International Authority File (VIAF)**
 - WebEx recording
 - Presentation slides
 - Summary and member questions

The "Table of contents" sidebar on the right lists 13 items, corresponding to the sessions listed in the main content area.

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

Virtual AskQC Office Hours feedback survey

Please take moment to provide feedback on today's office hour session. The responses are for informational purposes only and optional. Thank you for attending today's session!

1. Did you find today's session useful?

- Yes
 No
 Sort of

2. Why did you choose the answer you did in question 1?

Enter your answer

3. Are there topics you would like us to cover in the future?

Enter your answer

On the call today



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Senior Consulting
Database Specialist

Robert Bremer
Senior Consulting
Database Specialist

SEARCHING IN CONNEXION CLIENT AND RECORD MANAGER: BIBLIOGRAPHIC RECORDS



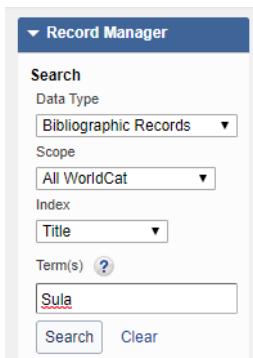
Hi everyone! As already mentioned, Bryan and I will be discussing differences in searching bibliographic and authority records in Connexion Client and WorldShare Record Manager. You will soon find out that both systems have similar capabilities and the differences lie in how the interfaces look, indexes, 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.



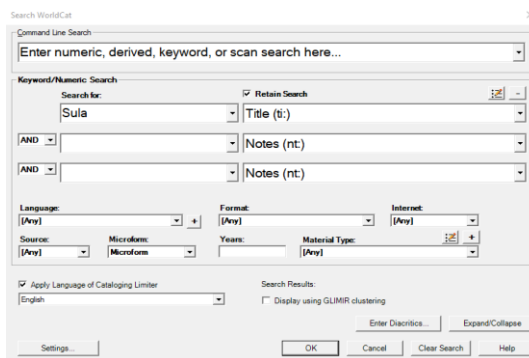
Basic searching in the context of this presentation is defined as searches which consist of a single term or phrase paired with an index (such as title, author, ISBN).

Basic searching



The Record Manager search interface features a blue header with a dropdown arrow and the text "Record Manager". Below this is a "Search" section with a "Data Type" dropdown menu set to "Bibliographic Records". A "Scope" dropdown menu is set to "All WorldCat". An "Index" dropdown menu is set to "Title". A "Term(s)" input field contains the text "Sula". At the bottom are "Search" and "Clear" buttons.

Record Manager



The Connexion Client search interface is a window titled "Search WorldCat". It has a "Command Line Search" field with the placeholder text "Enter numeric, derived, keyword, or scan search here...". Below this is a "Keyword/Numeric Search" section with a "Search for:" dropdown set to "Sula" and a "Retain Search" checkbox checked. There are two "AND" search criteria fields, both set to "Notes (nt)". The "Language" dropdown is set to "[Any]", "Format" to "[Any]", and "Internet" to "[Any]". The "Source" dropdown is set to "[Any]", "Microform" to "Microform", "Years" to "[Any]", and "Material Type" to "[Any]". At the bottom, there are checkboxes for "Apply Language of Cataloging Limiter" (checked) and "Display using GLIMR clustering" (unchecked). Buttons for "Enter Diacritics...", "Expand/Collapse", "Settings...", "OK", "Cancel", "Clear Search", and "Help" are also present.

Connexion Client



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.

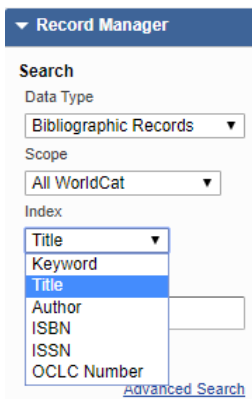
From the Index dropdown list, select any of the basic search indexes available.

Finally click on Search.

On the right side of the slide, you can reach the navigation screen in Connexion client

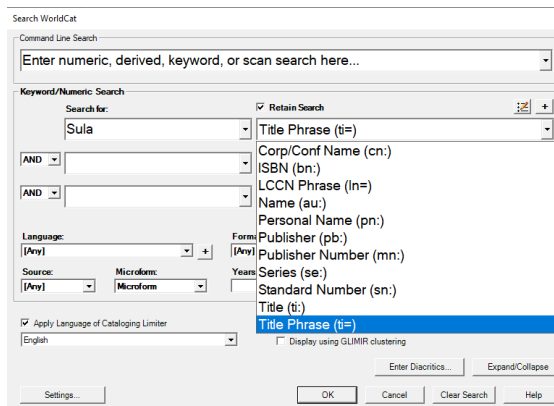
by pressing F2, clicking on the Search WorldCat icon which has a magnifying glass, or clicking on the menu bar Cataloging--Search--WorldCat. For basic searching you would type the search term or phrase in the keyword/numeric search section in the free text under "Search for." The index drop-down list would be right next to your search term or phrase. Select the one that you wish to search and click on "OK"

Indexes for basic searching



The screenshot shows the 'Record Manager' search interface. It features a 'Search' section with a 'Data Type' dropdown set to 'Bibliographic Records' and a 'Scope' dropdown set to 'All WorldCat'. Below this is an 'Index' dropdown menu with a list of options: 'Title', 'Keyword', 'Title', 'Author', 'ISBN', 'ISSN', and 'OCLC Number'. The 'Title' option is currently selected and highlighted. A link for 'Advanced Search' is visible at the bottom right of the interface.

Record Manager



The screenshot shows the 'Search WorldCat' interface in the Connexion Client. It includes a 'Command Line Search' field with the placeholder text 'Enter numeric, derived, keyword, or scan search here...'. Below this is a 'Keyword/Numeric Search' section with a 'Search for:' dropdown containing 'Sula'. To the right, there is a 'Retain Search' checkbox and a list of search indexes. The 'Title Phrase (ti=)' index is selected and highlighted. Other visible indexes include 'Corp/Conf Name (cn:)', 'ISBN (bn:)', 'LCCN Phrase (ln=)', 'Name (au:)', 'Personal Name (pn:)', 'Publisher (pb:)', 'Publisher Number (mn:)', 'Series (se:)', and 'Standard Number (sn:)'.

Connexion Client

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.

Browse search

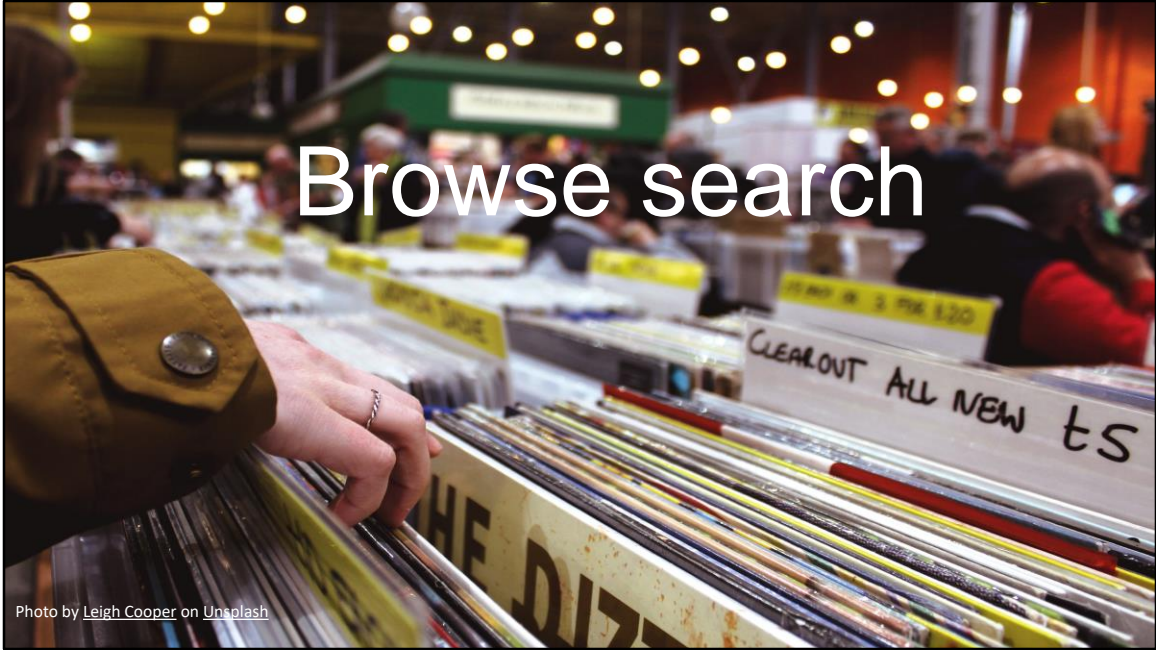


Photo by Leigh Cooper on Unsplash

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.

Browse searching – Record Manager

The screenshot shows the WorldShare Record Manager interface. The search bar contains the text "cantiqes populaires pour la". The search results table shows the following data:

Index Term	Rows
cantiqes populaires en l'honneur de sainte therese de l'enfant jesus	2
cantiqes populaires et chants latins pour le salut	1
cantiqes populaires fete de noel	1
cantiqes populaires illustrations par a vasseur	1
cantiqes populaires jesus marie joseph st vincent	14
cantiqes populaires jesus marie joseph st vincent de nau	17
cantiqes populaires la chorale dandre orassi	1
cantiqes populaires mis en harmonie pour orgue ou harmonium et pour les voix par labbe l lepage	1
cantiqes populaires pour heures de garde	1
cantiqes populaires pour la fete de noel harmonises a quatre voix mixtes	1
cantiqes populaires pour la fete de noel harmonises pour quatre voix mixtes et orgue par e gagnon nouvelle edition	1
cantiqes populaires pour le pelerinage daibi a lourdes 1882	1

The dropdown menu for the Index field is open, showing the following options:

- Corp./Conf. - Whole Phra
- Corp./Conf. - Whole Phrase
- Dewey Decimal class number
- LC Class Number
- Personal Name - Whole Phrase
- Publisher phrase
- LCSH
- LCSH phrase
- LCSH - Whole Phrase
- Title - Whole Phrase**
- Canadian Class Number



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.

Browse searching – Connexion Client

CANTIQ	Subject Whole Phrase (suw=)	A	1
CANTIQ	Corp/Conf Whole Phrase (cnw=)	EUREUSE THE	2
CANTIQ	Dewey Class Number (dd:)	HERESE DE LE	1
CANTIQ	LC Class Number (lc:)	ALUT	1
CANTIQ	Name Whole Phrase (auw=)		7
CANTIQ	Personal Name Whole Phrase (pnw=)	EUR	1
CANTIQ	Publisher Phrase (pb=)	NCENT	1
CANTIQ	Series Whole Phrase (sew=)	NCENT DE PAU	2
CANTIQ	Subject Whole Phrase (suw=)	SI	1
CANTIQ	Title Whole Phrase (tiw=)	GUE OU HARM	1
CANTIQ	Uniform Title Whole Phrase (utw=)		
CANTIQUES POPULAIRES POUR HEURES DE GARDE			14
CANTIQUES POPULAIRES POUR LA FETE DE NOEL			18
CANTIQUES POPULAIRES POUR LA FETE DE NOEL HARMONISES A QUATRE VOIX MIXTES			1

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

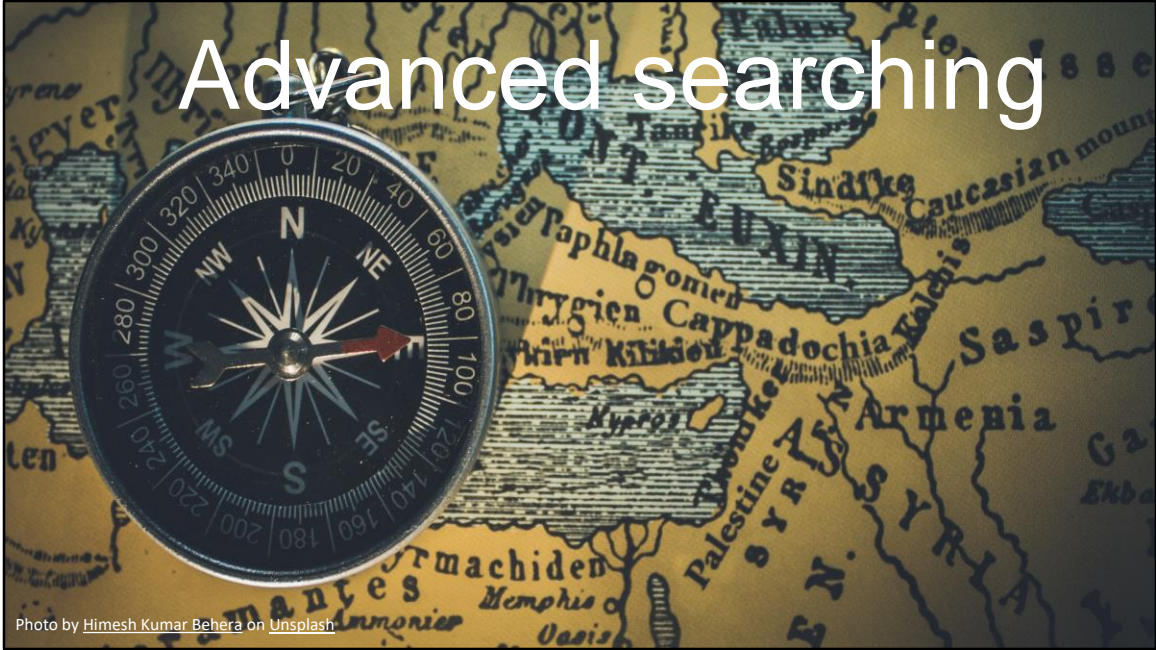


Photo by Himesh Kumar Behera on Unsplash

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 – Record Manager

Advanced Search

Search Scope: All WorldCat

Index(es): Title (ti)

AND Author (au): Jane Addams

AND Publisher (pb.): Macmillan

AND Place of Publication (pl): New York

AND Keyword (kw:): Enter search term(s)

Format(s): Book

Language(s): English (eng)

Year(s): 1910

Source of Cataloging: Select one or more

Language(s) of Cataloging: English (eng)

Limit Results to:

- Abbreviated-level records
- OCLC Music Hire records
- OCLC Publications New Zealand records

Reset Search Cancel



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 in 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 refine 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"

Advanced searching – Connexion Client

The screenshot shows the 'Advanced Search' dialog box in the Connexion Client. It features a 'Command Line Search' field at the top. Below it is the 'Keyword/Numeric Search' section, which includes a 'Search for:' field containing 'twenty years at hull-house' and a dropdown menu set to 'Title (ti:)', with a 'Retain Search' checkbox. There are two 'AND' search rows: the first has 'jane addams' and a dropdown set to 'Name (au:)', and the second has 'macmillian' and a dropdown set to 'Publisher (pb:)', both with a 'Retain Search' checkbox. The 'Language' is set to 'English', 'Format' to 'Books', and 'Internet' to '[Any]'. The 'Source' is '[Any]', 'Microform' is '[Any]', 'Years' is '1910', and 'Material Type' is '[Any]'. There are checkboxes for 'Apply Language of Cataloging Limiter' (checked) and 'Display using GLIMR clustering' (unchecked). At the bottom, there are buttons for 'Settings...', 'OK', 'Cancel', 'Clear Search', and 'Help', along with 'Enter Discreta...' and 'Expand/Collapse' options.



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

Expert searching



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.

Expert searching – Record Manager

The screenshot displays the WorldShare Record Manager interface. At the top, the search bar contains the query: "Expert Search = ti:invisible man AND au:Ralph Ellison AND yr:1952- (All WorldCat)". The search results show two entries for "Invisible man" by Ralph Ellison. The first entry is a print book published by Vintage International in 1995, with ISBN# 0679732764. The second entry is a print book published by Random House in 1952, with ISBN# 9780679732761. Both entries are marked as "Not Held by my library" and include a link to "1974 libraries hold this item" and "1456 libraries hold this item" respectively. A red box highlights the search query input field in the top left corner, which contains the text "invisible man AND au:Ralph Ellison AND yr:1952-". The interface also shows various filters on the left, such as "Language of Cataloging" (English 381, German 74, French 33) and "Format" (Thesis/Dissertation 3, Braille 2, Large Print 2, Audiobook 50, CD 15, eAudiobook 14).

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 – Connexion Client

Command Line Search

ti:electric car in america and pn:Kerry Segrave and yr:2019 not mt:URL

Keyword/Numeric Search

Search for: Title (ti:)

AND Corp/Conf Derived (cd:)

AND Publisher (pb:)

Language: + Format: Internet:

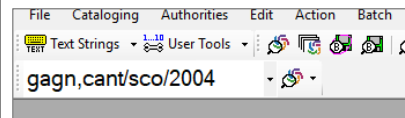
Source: Microform: Years: Material Type:

Apply Language of Cataloging Limiter
English

Search Results:
 Display using GLIMIR clustering

Enter Diacritics... Expand/Collapse

Settings... OK Cancel Clear Search Help



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.

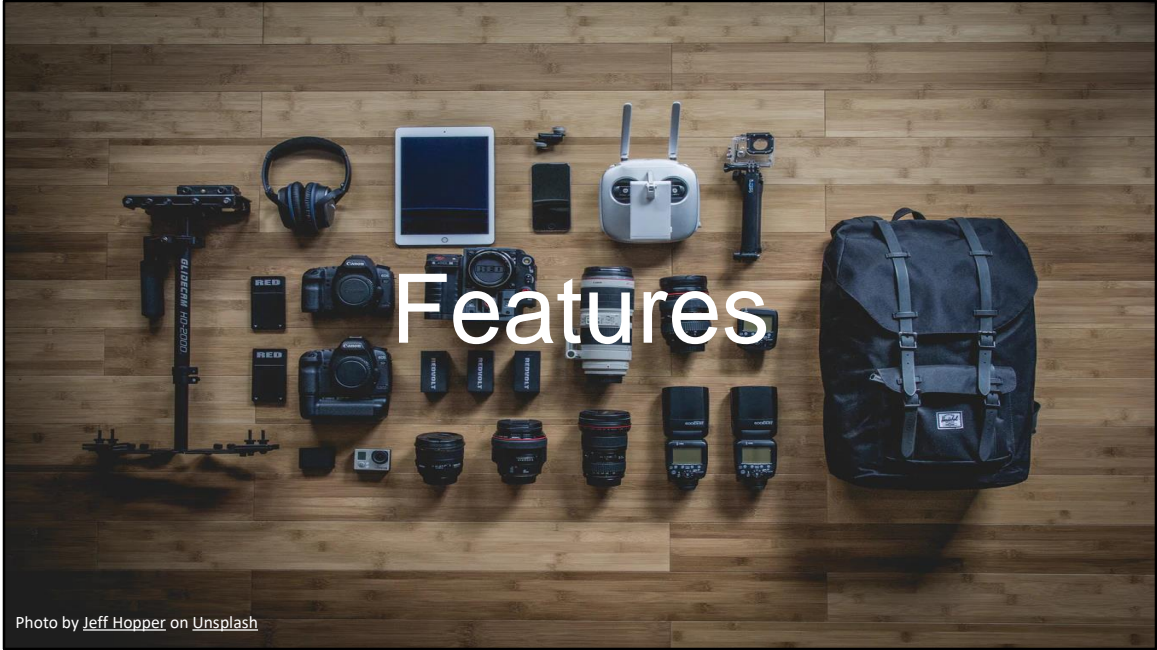


Photo by Jeff Hopper on Unsplash

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.

Facets and limiters – Record Manager

The screenshot displays the WorldShare Record Manager interface. The search criteria are ISBN = 9780739343364 (All WorldCat). The facets panel on the left is highlighted with a red box and includes the following filters:

- Hide Facets
- Language of Cataloging
 - English 4
 - Danish 1
- Format
 - Audiobook 5
 - CD 4
- Year
 - 2002 3
 - 1973 1
 - 2007 1
- Author
 - Morrison, Toni 5
- Language
 - English 5

The search results table shows two records, both marked as 'Not Held by my library'.

Image	Title	Description	Availability	Actions
	Sula	by Toni Morrison Audiobook on CD, English Publisher: New York : Random House Audio, [2007], ©2002. ISBN#: 9780739343364 BTCTA, BTCTA eng Min, OCLC#: 232867667	Not Held by my library 16 libraries hold this item	Edit Derive
	Sula	by Toni Morrison Audiobook on CD, English Publisher: New York : Random House Audio, ©2002. ISBN#: 9780739343364 IUK, IUK eng Full, OCLC#: 166230306	Not Held by my library 117 libraries hold this item	Edit Derive

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.

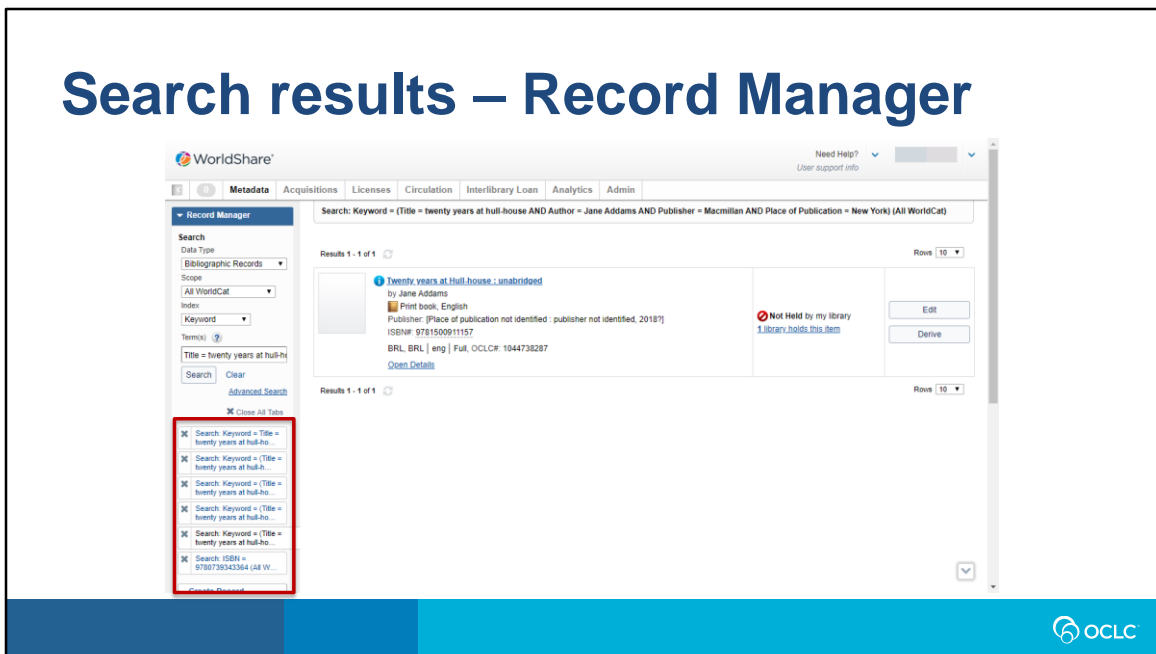
It's also worth noting that within your results you can see some initial information about the record: whether it has full or minimal description, and the library that first created the record. Additional information can also be viewed by clicking on the blue circle with an I.

Facets and limiters – Connexion Client

The screenshot displays the Connexion Client search interface. At the top, there is a "Command Line Search" field with the placeholder text "Enter numeric, derived, keyword, or scan search here...". Below this is the "Keyword/Numeric Search" section, which includes a "Search for:" field containing the value "9780739343364" and a "Retain Search" checkbox that is checked. The search criteria are set to "ISBN (bn:)", and there are two "AND" clauses, each with a "Notes (nt:)" dropdown menu. The "Language:" dropdown is set to "[Any]", "Format:" is "[Any]", and "Internet:" is "[Any]". The "Source:" dropdown is "[Any]", "Microform:" is "[Any]", "Years:" is "2002", and "Material Type:" is "[Any]". A red box highlights the "Apply Language of Cataloging Limiter" checkbox, which is checked, and the "English" dropdown menu below it. Another red box highlights the "Years:" field containing "2002". The "Search Results:" section includes a checkbox for "Display using GLIMIR clustering" which is unchecked. At the bottom, there are buttons for "Settings...", "OK", "Cancel", "Clear Search", and "Help".

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.”

Search results – Record Manager



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.

Search results – Connexion Client

Rec...	Description
1	Kynes, Will, 1981- author. An obituary for "Wisdom Literature" : the birth, death, and intertextual reintegration of a biblical corpus / Will Kynes. Oxford : Oxford University Press, 2016. 116 p. : illustrations [ELECTRONIC] CatL:eng OCLC: 1080190747, Holdings: 116
2	Kynes, Will, 1981- author. An obituary for "Wisdom Literature" : the birth, death, and intertextual reintegration of a biblical corpus / Will Kynes. Oxford : Oxford University Press, 2016. 116 p. : illustrations ; 23 cm CatL:eng OCLC: 1032354512, Holdings: 81

Brief List

Nec.	Title	Name or 245	Publisher	Date	L	HL	Holdings	Control of Cat.
1	Perfect scale		Detail	2016			2	1082349160 eng
2	Perfect scale		Edition DETAIL	2016			4	1082339691 eng
3	The perfect scale :	Dorsey, Doug	TheFitnessProfessor.com,	2018			1	1048610350 eng
4	Perfect Scale /	Schulz, Ansgar	DETAIL,	2016			1	1086650970 eng
5	Perfect Scale	Schulz, Ansgar	DETAIL,	2016			377	962064598 eng
6	Perfect Scale	Schulz, Ansgar author	Institut für Internationale Architektur-Dokumentation,	2015			1	1084416137 eng
7	Perfect Scale :	Schulz, Ansgar, author	Institut für Internationale Architektur-Dokumentation,	2015			3	1066413125 eng
8	Perfect scale :	Schulz, Ansgar, author	Detail,	2015			33	971099842 eng
9	Perfect scale :	Schulz, Ansgar, author	Edition DETAIL,	2016			22	991382324 eng
10	Perfect scale /	Schulz, Ansgar, 1966- author	Edition DETAIL,	2015			5	1002025983 eng
11	Perfect scale /	Schulz, Ansgar, 1966- author	DETAIL,	2015			3	972871849 eng
12	Perfect scale :	Schulz, Ansgar, 1966- author	Edition Detail,	2015			841	964881002 eng
13	Perfect scale :	Schulz, Ansgar, 1966- author	Detail, Institut für Internationale Architektur-Dokum.,	2015			14	946812119 eng
14	Perfect scale :	Schulz, Ansgar, 1966- author	Detail, Institut für Internationale Architektur-Dokum.,	2016			538	1080538053 eng
15	Perfect scale :	Schulz, Ansgar, 1966- author	Detail,	2016	D		10	962482789 eng
16	PERFECT SCALE	SCHULZ, ANSGAR; SCHULZ, BENEDIKT	EDITION DETAIL,	2016			2	980496686 eng

Truncated List

Format	Dates	Recor...
Books	2010	108
Books	2011	102
Books	2012	76
Books	2013	88
Books	2014	92
Books	2015	76
Books	2016	72
Books	2017	80
Books	2018	95
Books	2019	16
Textual Serials	2011	1
Visual Materials	2010-2018	91
Maps	2010	1
Music Scores	2012	1
Computer Files	2016	1

Group List

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

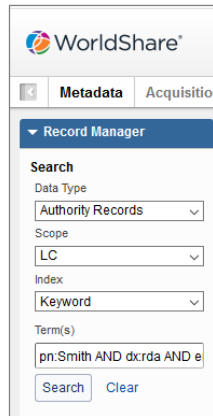
- Same LC-related files as Connexion
- Canadiana Name Authorities
- Canadian Subject Headings
- Integrated Authority File (GND)
- Medical Subject Headings (MeSH)
- Māori Subject Headings
- Dutch Names Authority file (NTA Names)
- *More coming soon*



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.

Searching authorities



WorldShare

Metadata Acquisition

Record Manager

Search

Data Type
Authority Records

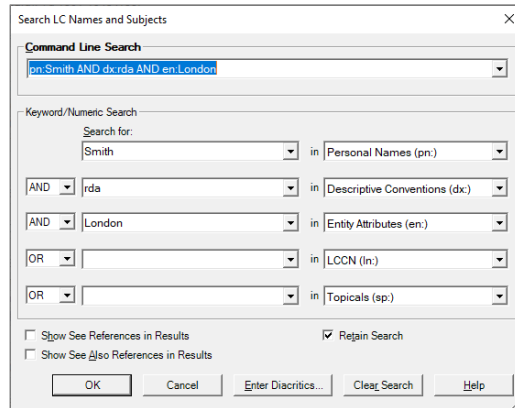
Scope
LC

Index
Keyword

Term(s)
pn:Smith AND dx:rda AND e

Search Clear

Record Manager



Search LC Names and Subjects

Command Line Search
pn:Smith AND dx:rda AND en:London

Keyword/Numeric Search

Search for: Smith in Personal Names (pn:)

AND rda in Descriptive Conventions (dx.)

AND London in Entity Attributes (en.)

OR in LCCN (ln.)

OR in Topicals (sp.)

Show See References in Results Retain Search

Show See Also References in Results

OK Cancel Enter Diacritics... Clear Search Help

Connexion Client



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.

Searching authorities

Connexion

- For searches retrieving more than 100 matches, Connexion displays a warning message, but allows the user to page down through more than 5000 results

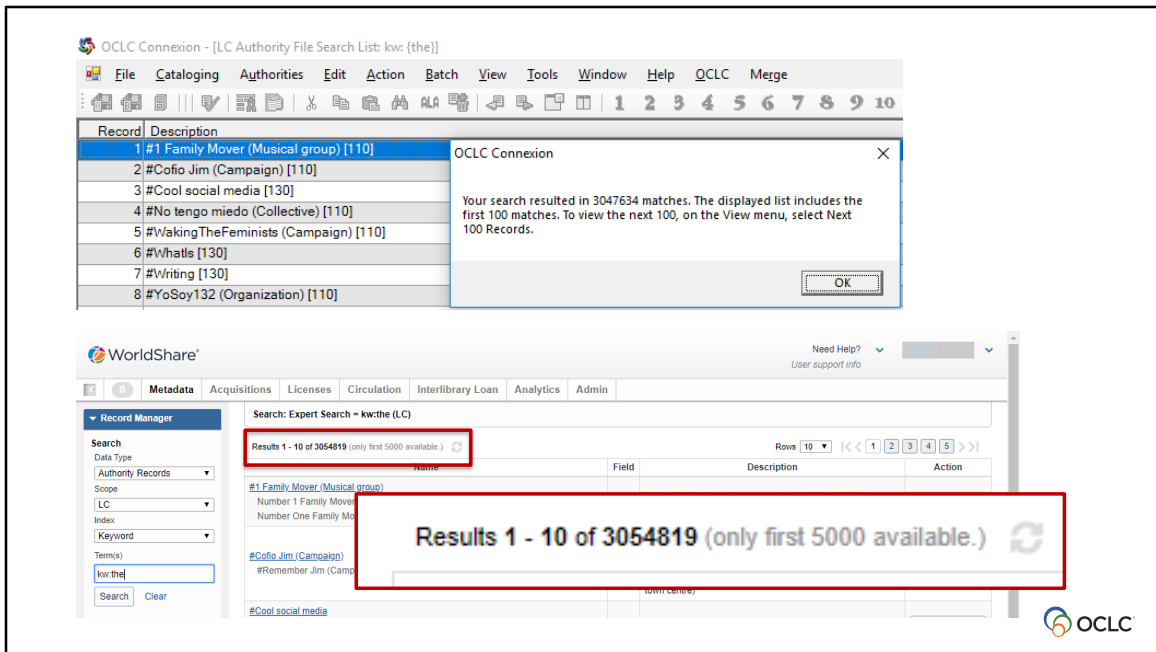
Record Manager

- Displays the number of total matches, but only the first 5000 are available



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>

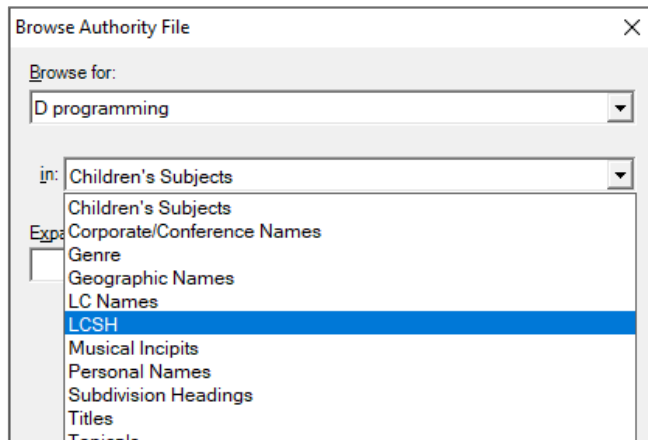


As noted in the previous slide, the top image shows a message in Connexion client indicating that there were more than 100 matches and explains how to view the next 100.

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.

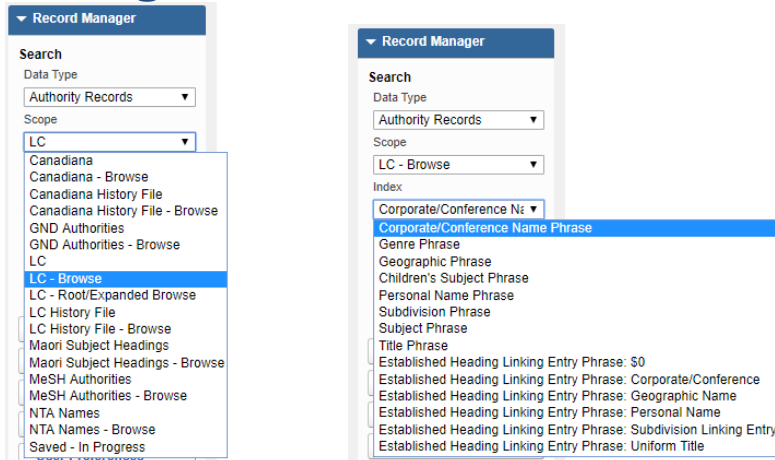
In Record Manager, depending on how preferences are set, users can choose to display 4xx, 5xx, and 7xx references, in addition to 1xx fields. In Connexion, users have the option to see 4xx and 5xx references based on checkboxes in the Search window.

Browsing authorities – Connexion Client



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.

Browsing authorities – Record Manager



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.

Results – Record Manager

The screenshot shows the Record Manager interface. On the left is a search sidebar with the following settings: Data Type: Authority Records; Scope: LC - Browse; Index: Personal Name Phrase; Term(s): shakespeare william 1564-1616. The main area displays a list of records under the heading 'Browse: Personal Name Phrase = shakespeare william 1564-1616 (LC - Browse)'. The records are as follows:

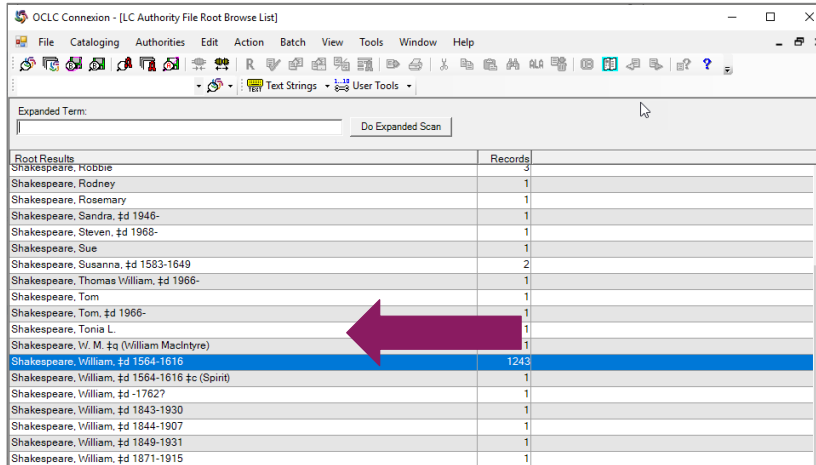
Index Term
shakespeare steven 1968
shakespeare sue
shakespeare susanna 1583 1649
shakespeare thomas william 1966
shakespeare tom
shakespeare tom 1966
shakespeare tonia j
shakespeare vaidya
shakespeare w m william macintyre
shakespeare william 1564 1616
shakespeare william 1564 1616 spiritj
shakespeare william 1762
shakespeare william 1843 1930
shakespeare william 1844 1907

A purple arrow points to the record 'shakespeare vaidya'.

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.

Results – Connexion Client



OCLC Connexion - [LC Authority File Root Browse List]

Expanded Term: Do Expanded Scan

Root Results	Records
Shakespeare, Hobbie	1
Shakespeare, Rodney	1
Shakespeare, Rosemary	1
Shakespeare, Sandra, †d 1946-	1
Shakespeare, Steven, †d 1968-	1
Shakespeare, Sue	1
Shakespeare, Susanna, †d 1583-1649	2
Shakespeare, Thomas William, †d 1966-	1
Shakespeare, Tom	1
Shakespeare, Tom, †d 1966-	1
Shakespeare, Tonia L.	1
Shakespeare, W. M. †g (William MacIntyre)	1
Shakespeare, William, †d 1564-1616	1243
Shakespeare, William, †d 1564-1616 †c (Spirit)	1
Shakespeare, William, †d -1762?	1
Shakespeare, William, †d 1843-1930	1
Shakespeare, William, †d 1844-1907	1
Shakespeare, William, †d 1849-1931	1
Shakespeare, William, †d 1871-1915	1

However, looking at the browse results for the same query in Connexion, Shakespeare Vaidya does not appear.

ARN 5049304

LDR nzn

001 oca05049304

008 990820n1 acannaabn la aaa

005 19990823171420.0

010 no 99060025


040 DLC-ON #b eng #c DLC-ON

100 1 Vaidya, Shakespeare

400 0 Shakespeare Vaidya

670 Project failures and sickness in Nepal, 1998: #b t.p. (Shakespeare Vaidya; MBA, MBF (Italy), LL.B., Dip. in Forex, Dip. in Rural Dev.)

Shakespeare, William Henry, #d 1871-1915	1
Shakespeare, William Henry Irvine, #d 1871-1915	1
Shakespeare, Wilma, #d 1943-	1
Shakespeare	1
Shakespeare #c (Cat)	1
Shakespeare family	2
Shakespeare-Finch, Jane	1
Shakespeare Vaidya	1
Shakespeare, #d 1564-1616	1
Shakespeare, A. G.	1
Shakespeare, African	1
Shakespeare, Anne Hathaway, #d 1556?-1623	1
Shakespeare, Charles David	1
Shakespeare, Colin, #d 1929-	1
Shakespeare, Daddy	1



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

<click>

Conducting a Browse on the 400 shows that Connexion files it before the "Shakespeare" headings that do include a comma.

Root-Expanded – Connexion Client

Browse Authority File

Browse for:
shakespeare, william, 1564-1616

in: Personal Names

Expanded Term:
Hamlet

Clear Search Enter Diacritics...

OK Cancel Help

OCLC Connexion - [LC Authority File Expanded Browse List]

File Cataloging Authorities Edit Action Batch View Tools Window Help

Text Strings User Tools

Results	Records
Shakespeare, William, †d 1564-1616.	13
‡Hamlet [100]	
‡Hamlet [500]	8
‡Hamlet ‡2008 [100]	1
‡Hamlet ‡n Act 1, Scene 3 ‡ German & English ‡k Selections [400]	1
‡Hamlet ‡n Act 1, Scene 3 ‡k Selections ‡ German & English [100]	1
‡Hamlet ‡ Albanian [100]	1
‡Hamlet ‡ Armenian [100]	1
‡Hamlet ‡ Belarusian [100]	1
‡Hamlet ‡ Chinese [100]	1
‡Hamlet ‡ Chinese ‡s (Lin) [100]	1
‡Hamlet ‡ Chinese ‡s (Zhu) [100]	1
‡Hamlet dán kórdilyé [400]	1
‡Hamlet ‡ Esperanto [100]	1
‡Hamlet ‡ Finnish [100]	1
‡Hamlet ‡ German [100]	1
‡Hamlet ‡ German & English [100]	1
‡Hamlet ‡ German ‡s Schlegel [100]	1
‡Hamlet ‡ Greek [100]	1
‡Hamlet ‡ Hungarian [100]	1
‡Hamlet in excerpts [400]	1



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.

Root-Expanded – Record Manager

The screenshot shows the WorldShare Record Manager interface. The top navigation bar includes 'Metadata', 'Acquisitions', 'Licenses', 'Circulation', 'Interlibrary Loan', 'Analytics', and 'Admin'. The 'Record Manager' section is active, displaying a search for 'Personal Name = shakespeare, william, 1564-1616 / hamlet (LC - Root/Expanded Browse)'. The search criteria are: Data Type: Authority Records, Scope: LC - Root/Expanded Brov, Index: Personal Name, Term(s): shakespeare, william, 1564-. The expanded term is 'hamlet'. The results list includes:

- 1 Hamlet (100)
- 1 Hamlet (500)
- 1 Hamlet_1f2008 (100)
- 1 Hamlet_1n Act 1_Scene 3_1f German & English_1k Selections (400)
- 1 Hamlet_1n Act 1_Scene 3_1k Selections_1f German & English (100)
- 1 Hamlet_1f Albanian (100)
- 1 Hamlet_1f Armenian (100)
- 1 Hamlet_1f Belarusian (100)
- 1 Hamlet_1f Chinese (100)
- 1 Hamlet_1f Chinese_1s (Lip) (100)
- 1 Hamlet_1f Chinese_1s (Zhu) (100)
- 1 Hamlet_dán királyi (400)



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.

User preferences – Record Manager

The screenshot displays the 'User Preferences' window. At the top, there are buttons for 'Save' and 'Discard Page Changes'. A green checkmark indicates 'Saved the preferences.' Below this, a list of preference categories is shown: 'Exporting - Authority Records', 'Exporting - Bibliographic Records', 'Searching - Advanced', and 'Searching - Basic'. The 'Data Type Options' section is expanded, showing tabs for 'Authority Records', 'Bibliographic Records', 'LBD Records', and 'LHRs'. The 'Authority Records Basic Search Preferences' section includes a 'Reset Form' button and several checkboxes: 'One Search Result Only' (unchecked), 'Open record for editing' (checked), 'Diacritics' (unchecked, with a note 'Not applicable for LC Root/Expanded Browse'), and 'Enter search terms with diacritics' (checked). Under 'Authority References', three checkboxes are checked: 'Show See references in search results', 'Show See Also references in search results', and 'Show Heading Linking Entries in search results'. The 'Search Scope(s) for Authority Records' section includes a note: 'Specify whether you want each search scope to be displayed in the menu and what order you want them to be listed. You must display at least one search scope. Click on the name of the search scope to customize the options.'

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.

Resources

Searching in Record Manager

[oclc/searchRM](https://oclc.org/oclc/searchRM)

Connexion client training

[oclc/connexionclient-training](https://oclc.org/oclc/connexionclient-training)

Searching WorldCat Indexes

[oclc/indexes](https://oclc.org/oclc/indexes)

Authorities: Format and Indexes

[oclc/authorities](https://oclc.org/oclc/authorities)

Record Manager Authorities Guide

[oclc/authoritiesRM](https://oclc.org/oclc/authoritiesRM)



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?



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Please submit questions through chat



Thank you!

Send cataloging policy questions
at anytime to:

askqc@oclc.org

Session links available at:

oclc.org/askqc

Next Virtual AskQC Office Hours:

January 2020, date TBD

Registration will be available at oclc.org/askqc

**Because
what is
known must
be shared.®**

