

# News From OCLC

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## **OCLC Products and Services Release Notes**

Find the most current release notes for many OCLC products and services as well as links to data updates and to dynamic collection lists at [https://help.oclc.org/Librarian\\_Toolbox/Release\\_notes](https://help.oclc.org/Librarian_Toolbox/Release_notes). Included are CONTENTdm, EZproxy, Tipasa, WorldCat Discovery, WorldCat Knowledge Base, WorldCat Matching, WorldCat Validation, WorldShare Acquisitions, WorldShare Circulation, WorldShare Collection Evaluation, WorldShare Collection Manager, WorldShare Interlibrary Loan, WorldShare License Manager, WorldShare Record Manager, and WorldShare Reports.

## **WorldCat, Cataloging, and Metadata**

### **Connexion Client 3.0**

OCLC is pleased to announce that a new release of the Windows-based Connexion client is coming soon. Connexion client 3.0 will include the following changes:

- Conforms to current security and technology standards – no need for Administrator privileges to install.
- Provides updated online documentation.
- Removes obsolete functionality – GLIMIR options, Institution Records, and more.
- Converts macros automatically to 64-bit compatibility.

The new version will require Windows 10 (64-bit version). The early adopter field test is planned for May/June 2021. OCLC will directly invite libraries that have participated in previous field tests. In addition, we are looking for libraries that use network-shared local files, macros, label printing, or the CJK E-Dictionary to join the test. If you are interested in participating, please contact [cnx-product@oclc.org](mailto:cnx-product@oclc.org). OCLC expects to release Connexion client 3.0 in the July/August 2021 timeframe. Support for older versions will be discontinued in 2022 with minimum of three months advance notice. Watch for additional information about the new release of Connexion client in the coming months. Note that this does not impact the Web-based Connexion browser.

### **WorldCat Validation Installation, February 2021**

On 2021 February 25, an OCLC-MARC Validation installation took place. It included the MARC 21 Bibliographic, Authority, and Holdings Updates No. 31 (December 2020), the new MARC Codes from four LC Technical Notices (October through December 2020), and one bug fix. Full details are available in the [WorldCat Validation Release Notes, February 2021](#).

### **Member Merge Project Report**

OCLC staff has been merging duplicates manually since 1983 and via the automated Duplicate Detection and Resolution (DDR) software since 1991. For years, we'd talked about enabling specially trained members of the cooperative to do manual merges. The pilot Member Merge Project began in 2013 with four participants, after which we re-evaluated. In 2017, we resumed the project with a second group of institutions. We've had a total of five MMP cohorts, resulting in a current roster of 53 participating institutions. Over the years, we've streamlined the training process through better documentation and videos, created the Member Merge portion of the OCLC Community Center, and recruited several external reviewers. From the beginning of MMP through 2021 February 28, participating institutions have merged 79,503 sets of duplicate bibliographic records. We are looking for libraries that would like to join the sixth MMP cohort. The single requirement is that the library must be a member of the Program for Cooperative Cataloging (PCC), participating in NACO at a minimum. If you are interested, email us at [askqc@oclc.org](mailto:askqc@oclc.org).

## **OCLC's Capira Mobile Library Services Recognized with 2021 Modern Library Awards**

OCLC's [CapiraMobile](#) and [CapiraCurbside](#)—mobile library services that offer flexibility, choice, and convenience for libraries and their users—have been recognized with LibraryWorks' 2021 Modern Library Awards. CapiraMobile, a platinum Modern Library Award (MLA) winner for the second consecutive year, makes it possible for users to interact with their library through their mobile phones, making collections, events, and programs available anywhere, anytime. CapiraCurbside, which received a silver MLA, makes it easy for libraries to connect users with physical library materials without the need to enter the building. This solution seamlessly integrates with library systems as well as Capira's mobile apps and allows libraries to communicate with users about when materials are ready and how to pick them up. These mobile services were envisioned long before the pandemic resulted in library closings, and they continue to be enhanced as the needs of libraries and their users evolve. The Modern Library Awards were created to recognize the top products and services in the library industry in a truly unbiased format. Products and services were submitted in the fall of 2020. Submissions were batched into small groups and sent to the LibraryWorks database of more than 80,000 librarians at public, K-12, academic, and special libraries. Only customers with experience with these products/services in their facilities were permitted to judge, resulting in an unbiased score. Each judge scored the product on a numeric basis from 1-10 on a series of questions regarding functionality, value, customer service, etc.

### **Delivery Services**

#### **Surfacing the Best Access Options for Users: Discovery's Role in Smart Fulfillment, by Danielle Bromelia, Senior Product Analyst, Discovery Services**

As we forge deeper into 2021, we continue innovating across the organization toward [our library on-demand vision](#), which works to leverage technology, tools, and capacity to create impactful end-user experiences. Ultimately, library on-demand will provide immediate access and smart fulfillment of valuable resources, connecting library staff and end users to a massive global inventory through the power of WorldCat. Our focus areas include intuitive discovery, smart fulfillment, personalized experience, and powerful network—and we've made tangible progress in a wide variety of ways. I want to highlight the achievements of my resource sharing colleagues and share how we're supporting [smart fulfillment](#) through enhancements to WorldCat Discovery. To meet the evolving expectations of today's information seeker, fast, convenient, and intuitive are not enough. With smart fulfillment, a user's request sets a dynamic, data-driven process in motion that delivers accurate resource options and delivery recommendations in just seconds, enhancing the discovery and access to an ever-growing collection of e-resources, articles, e-books, serials, and physical items from OCLC's network of more than 10,000 libraries around the world. Discovery plays an important role in the smart fulfillment process, which is why we're excited to release the "best access options" feature in WorldCat Discovery. This feature will use a library's fulfillment inputs to determine the best physical and electronic fulfillment choices for users, helping them more quickly obtain the most appropriate items available. For our WorldCat Discovery users, I invite you to [learn more about the best access options](#).

#### **National College of Art and Design Now Live with OCLC's WMS**

The [National College of Art and Design](#) (NCAD), based in Dublin, Ireland, is now using OCLC's [WorldShare Management Services](#) as their library services platform to support their objectives of enhancing student experience and improving staff workflows. An advanced, cloud-based library services platform, WorldShare Management Services (WMS) saves library staff time and resources by helping them easily manage electronic, digital, and physical materials, all in one interface. With [WorldCat](#) as its foundation, WMS allows for innovation, and contributing to and drawing on the collaborative data and work of libraries worldwide. NCAD has origins dating as far back as 1746. In 1996, NCAD became a recognized college of the National University of Ireland, and of University College Dublin in 2011. With 1,000 students and four schools focusing on different aspects of art and design, their mission is to "change the world through bold and curious thinking, making, and doing." The Edward Murphy Library houses more than 100,000 books, pamphlets, video material, periodicals, and exhibition catalogs, and the National Irish Visual Arts Library (NIVAL) holds special collections based around Irish visual art and design of the 20th and 21st centuries. More about [WorldShare Management Services](#) is on the website.

## **New Security Features Help Defeat Hackers and Avert Data Breaches**

The release of [EZproxy](#) version 7.1 introduces powerful new security features. These updates significantly improve library security in an environment where data breaches threaten library network security and interrupt e-resource access, and are more frequent and sophisticated. We've added:

- A robust and customizable set of security rules that automatically identify and disable compromised single sign-on credentials before they can be used to exploit systems.
- An optional pseudonymous user identifier that maintains patron privacy, resolves security issues faster, and provides more continuous access to e-resource subscriptions.

Detecting data breaches and finding the corresponding compromised user credentials can be challenging and time-consuming. Library staff can now use the real-time information from EZproxy's set of security rules to swiftly notify IT of a breach, disable account access before any systems are compromised, and investigate the cause to improve security protocols. They are also customizable so libraries can easily align with unique security workflows to be in the optimal position to mitigate data breaches. A data breach can interrupt access for all library users if content providers turn off licensed database access to protect e-content. Library staff can now use an optional feature in EZproxy that enables content providers to better determine the unauthorized user in the event of a data breach and avoid turning off licensed database access for all users. Because OCLC prioritizes patron privacy, we have designed the pseudonymous user identifier to streamline access to library e-resources without exposing any patron information. These new EZproxy features were carefully piloted with a diverse group of libraries to account for unique workflows, and we will continue to make enhancements to address emerging threats. We will also integrate new security insights into [EZproxy Analytics](#), a turnkey analytics service that helps libraries better understand and communicate their e-resource ROI. All the new security features are available to both EZproxy hosted and stand-alone customers.

## **GreenGlass Empowers Libraries to Make Print Serials Deselection Decisions with Confidence**

OCLC's GreenGlass now further empowers libraries to confidently make print collection management decisions by supporting the responsible deselection of serials. GreenGlass is a premium web-based collection analytics tool that allows libraries to explore, compare, and visualize collection attributes to make evidence-based decisions about their print collections. By leveraging and comparing data in WorldCat, JSTOR, and other known journal archives, GreenGlass equips libraries with the insights needed to take local action in a collective context and protect the scholarly record. These insights allow libraries to see how widely their serials titles are held and if their serials titles are held in known journal archives; to compare the extent of their serials holdings with those in known journal archives; to see which of their journal runs are out of date or incomplete; to segment their collection by location, subject, language, or publication status; and to search by title, ISSN, OCLC number, and OCLC work ID. Libraries have historically focused on establishing retention commitments in shared print programs, leaving a gap in the market for robust decision support tools that enable the safe deselection of titles. While it's important to know what libraries and groups have committed to retain, registration data is only a small part of the overall collection landscape and by itself doesn't equip libraries to fully see the impact of their collection management decisions. For more information about serials deselection using GreenGlass, please visit [oclc.org/greenglass](http://oclc.org/greenglass). For more information about shared print registration and discovery using OCLC services, please visit [oclc.org/sharedprint](http://oclc.org/sharedprint).

## **Resource Sharing**

### **Nine More Libraries Now Using Tipasa for Interlibrary Loan Management**

In recent weeks, nine libraries have implemented Tipasa for their ILL programs and joined a total of 316 libraries now using Tipasa. These include:

- Columbus Metropolitan Library (OCO), Ohio
- Massey University Library (UW1), New Zealand
- Noorda College of Osteopathic Medicine (NORDA), Utah
- Pennsylvania College of Technology (WSB)
- Saint Mary-of-the-Woods College (IMS), Indiana
- University of Pennsylvania, Biddle Law Library (PLL)
- University of Redlands (CUR), California

- United States Merchant Marine Academy (VYM), New York
- College of Southern Nevada (NVA)

As a cloud-based ILL management system, Tipasa enables libraries to manage a high volume of interlibrary loan requests, automate routine borrowing and lending functions, and provide an enhanced patron experience. It lets libraries meet users' needs without heavy IT support, server management, or extensive configuration and training. To learn about getting Tipasa for your library, [please contact us](#) to request more information.

## **Management Services**

### **OCLC, Fayetteville Public to 'Create Ultimate Library Experience' with Wise**

[Fayetteville Public Library](#) in Fayetteville, Arkansas, has signed on to implement [OCLC Wise](#), the community engagement system for U.S. public libraries. Wise is a holistic system that takes community engagement and collection management to a new level by combining the power of customer relationship management, marketing, and analytics with integrated library system (ILS) functionality, such as circulation and acquisitions. Wise is different; it's designed around people, not the collection. It supports libraries' continued shift into dynamic centers of activity and expands the impact libraries have on their communities. Fayetteville Public Library (FPL) is putting the finishing touches on a major expansion and renovations—part of FPL's 2030 Master Plan—which is now open to the public. Implementation of OCLC Wise is the next big step in the library's transformation. As FPL staff planned their state-of-the-art expansion, they considered the needs of their community—which included new focus on job training, culinary literacy, more youth services, among others. Some staff even had an opportunity to visit DOKK1, one of the most innovative new libraries in the world, in Aarhus, Denmark. Learn more about Wise at [oc.lc/wise](#).

## **Member Relations, Advocacy, Governance, and Training**

### **OCLC Annual Report 2019-2020**

The OCLC Annual Report 2019-2020 is now available at <https://www.oclc.org/en/annual-report/2020/home.html>, chronicling the first half of the most unusual year most of us have lived through. It looks at how members of the cooperative, as well as OCLC itself, have adapted, coped, and survived during the pandemic. As always, the report reminds us of accomplishments, enhancements, research, statistics, governance, and financials during Fiscal Year 2020.

### **Digital Stewardship Training for Tribal Libraries, Archives, Museums, and Small Public Libraries**

OCLC's WebJunction, in partnership with [Washington State University's Center for Digital Scholarship and Curation](#), is creating a series of 10 free online courses for staff at tribal archives, libraries, museums (TALMs), and small public libraries on digital stewardship and community-centered curation of cultural collections. These on-demand courses, adapted from the successful Tribal Digital Stewardship Cohort Program developed at Washington State University, are scheduled to launch in early 2022. OCLC and WSU are partnering on this project with support from an Institute of Museum and Library Services (IMLS) Laura Bush 21st Century Librarian grant. The project will also adapt and expand the original program's curriculum for staff at small public libraries throughout the United States, many of which are in under-resourced, rural, and geographically isolated locations. This expansion will address an important training need documented in OCLC's 2017 research report, [Advancing the National Digital Platform: The State of Digitization in US Public and State Libraries](#), which was funded by IMLS. According to that report's findings, while 92 percent of the public libraries surveyed reported having unique, locally significant materials, most respondents from small libraries indicated they have never digitized their collections. Among public library respondents, 61.4 percent identified insufficient staff training/expertise as a barrier to their digitization efforts. The courses build upon the IMLS-funded Tribal Digital Stewardship Cohort program, curriculum, and open educational resources developed by WSU's Center for Digital Scholarship and Curation (CDSC). The Tribal Stewardship Cohort Program has focused on the unique needs of tribal archives, libraries, and museums through a cohort-based model that focuses on tribal values, histories, and needs. The program builds on Mukurtu CMS, the open source platform built with Indigenous communities, as a core component of culturally sustainable digital heritage management. This adapted training will strengthen staff skills and knowledge of: The life cycle of digital stewardship, Collaborative

curation, Providing access to collections based on community values and priorities, Caring for physical and digital collections, Digitization planning and digital workflows, Creating policies to sustain and manage collections, Ethical stewardship of culturally sensitive collections. The continuing education courses being developed will be freely and broadly accessible to tribal archive, library, and museum staff and small public library staff, through [WebJunction](#) and on WSU's [Sustainable Heritage Network](#). The project is currently underway and will run through March 2022. More about this project can be found at [oclc.org/digital-stewardship](https://oclc.org/digital-stewardship).

### **Toolkit for Creating Smart Spaces**

Libraries continue to evolve and augment their role in providing lifelong learning for their communities. They have shifted from passive to active engagement with community members. They are becoming hubs of collaborative learning, providing space and services where people of all ages can participate in hands-on activities, explore and solve problems together, and strengthen social bonds. WebJunction offers the new [Toolkit for Creating Smart Spaces](#) to help libraries take steps towards reconfiguring physical spaces and reimagining services through active community engagement. These resources were developed to support small and rural libraries in the Small Libraries Create Smart Spaces program and have been collected in this new format to guide libraries of all types—from small and rural to large library systems—through a transformation process. The ten sections of the toolkit explore how to discover community needs, rethink use of existing physical spaces, test ideas with prototyping, create and implement a project plan, activate your space with programming, and more.

### **OCLC Research**

#### **REALM Project Releases Results from Tests of Virus on Materials at Different Temperatures**

The [REALM project](#) has released results from two rounds of scientific tests to determine how long the SARS-CoV-2 virus that causes COVID-19 can remain on materials found in archives, libraries, and museums at temperatures colder and warmer than previous tests. For the latest two rounds of testing, Tests 7 and 8, materials were held at colder (34 to 36°F; 1 to 4°C) and warmer (83 to 84°F; 28 to 29°C) temperatures. Tests 1 through 6 measured the attenuation time of virulent SARS-CoV-2 virus applied to materials held at ambient room temperature (68 to 75°F; 20 to 24°C). Tests 7 and 8 examined a hardcover book cover, a softcover book cover, a plastic protective cover, and expanded polyethylene foam. Samples of each material were inoculated with active virus, allowed to dry, and then placed in an environmentally controlled chamber with no outside light or air. Results show that attenuation rates for materials held at the colder temperature was significantly slower compared to the warmer and ambient temperatures, with detectable levels of active virus still present at day 10. In contrast, at the higher temperatures, the virus was undetected on all materials except the plastic protective cover by day 6; this was a slightly faster attenuation time than what occurred at ambient temperatures. (See [Test 7 and 8](#) results.) This data suggests that additional considerations may need to be evaluated regarding outdoor collection boxes, or storage in colder conditions. For institutions using quarantine periods, this research can impact when to start the quarantine "clock" once a material is brought into a controlled environment. Data also suggests that, when possible, storage in warmer areas may help to shorten the length of quarantine. The REopening Archives, Libraries, and Museums (REALM) project is designed to generate scientific information to support the handling of core library, museum, and archival materials as these institutions resume operations and reopen to the public. As part of this research, the project is studying how long the SARS-CoV-2 virus survives on common materials and methods to mitigate exposure. The REALM project also makes available a compilation of SARS-CoV-2 [scientific research](#), which summarizes current research on how the virus spreads, its survival on materials and surfaces, and the effectiveness of various prevention and decontamination measures. The research review highlights growing evidence that direct contact and respiratory droplets appear to be the primary modes of spread, and that aerosols may be a contributor to infection. These findings add to the evolving scientific understanding regarding SARS-CoV-2, which still includes uncertainties about: how much virus is shed by an infected person through coughing, sneezing, talking, breathing, etc.; how much virus is needed to infect someone; and the likelihood of a person becoming infected indirectly through contact with contaminated objects and surfaces. The project also provides toolkit resources to support archives, libraries, and museums. A new [resource](#) that synthesizes information from the U.S. Centers for Disease Control and Prevention on cleaning and disinfecting considerations is now available. The REALM project is supported by the [Institute of Museum and Library](#)

[Services](#) (IMLS), the primary source of federal funding for museums and libraries; and [OCLC](#), a nonprofit library technology and research organization; in partnership with [Battelle](#), a not-for-profit, independent global scientific research and development organization. Project updates are posted at [oclc.org/realms/oclc-research-library-partnership/](https://oclc.org/realms/oclc-research-library-partnership/) as they become available. Those interested can also [sign up](#) through the project website to receive timely email updates when new information is released.

### **New OCLC Research Report on Transforming Metadata into Linked Data**

*Transforming Metadata into Linked Data to Improve Digital Collection Discoverability*, an OCLC Research Report, shares the findings from the CONTENTdm Linked Data Pilot project. In this pilot project, OCLC partnered with institutions that manage their digital collections with OCLC's CONTENTdm service to investigate methods for—and the feasibility of—transforming metadata into linked data to improve the discoverability and management of digitized cultural materials and their descriptions. Five institutions collaborated with OCLC on this Linked Data Pilot project, representing a diverse cross-section of different types of institutions: The Huntington Library, Art Museum, and Botanical Gardens; The Cleveland Public Library; The Minnesota Digital Library; Temple University Libraries; University of Miami Libraries. Download the free report at [oclc.org/realms/oclc-research-library-partnership/](https://oclc.org/realms/oclc-research-library-partnership/).

### **University of Notre Dame Joins OCLC Research Library Partnership**

The [OCLC Research Library Partnership](#) (RLP) is excited to welcome the University of Notre Dame as a Partner. [University of Notre Dame Hesburgh Libraries](#) is a diverse system featuring the flagship Hesburgh Library—which houses the Navari Family Center for Digital Scholarship, Medieval Institute Library, Rare Books and Special Collections, and University Archives—and four specialty libraries located on the Notre Dame campus. Home to nearly 200 library faculty and staff, the Libraries hold more than 3.5 million monographs and subscribe to more than 35,000 serials. The enduring [mission](#) of Hesburgh Libraries is to connect people to knowledge across time and space—to acquire, preserve, organize, and steward this knowledge in ways that make it accessible for study by all scholars throughout time. The RLP supports focused programming and research in four areas crucial to research libraries: Research support, Unique and distinctive collections, Resource sharing, Next generation metadata. Across these four areas, the RLP seeks to support libraries through the challenges of COVID-19 and to advance equity, diversity, and inclusion efforts. The RLP currently comprises [124 Partner institutions](#) around the world. Visit [oclc.org/rlp](https://oclc.org/realms/oclc-research-library-partnership/) to learn more about the OCLC Research Library Partnership.

### **OCLC Research Update: Convening, Understanding, and Sharing**

The recording from our [ALA Midwinter 2021 OCLC Research Update session](#) is now available. Watch to learn more about the latest research and educational initiatives from OCLC Research. Amid the rapidly changing circumstances during 2020, OCLC Research undertook new projects and transformed existing ones to help library staff and decision makers respond to the broad changes unfolding around them, while also identifying implications for the library mission, and ultimately, library resources and services. This session includes these presentations:

- Community Stories: Resource Sharing, Rachel Frick, Executive Director, OCLC Research Library Partnership.
- Transition and Transformation: Realigning to develop a New Model Library, Lynn Silipigni Connaway, Director of Library Trends and User Research.
- Linked Data Research, Andrew Pace, Executive Director for Technical Research.
- Library Learning during COVID-19, Sharon Streams, Director of WebJunction and OCLC Project Director for REALM.