

Controlling Headings in Connexion Client

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Objectives

- Learn how to control headings and learn what the control headings process is doing
- Learn a bit about how to use the “Control Headings” window
- Learn what resources are available

Control Headings

- A process that links headings in the bibliographic record (in WorldCat) to the corresponding heading in the OCLC Authority File
- If a heading changes in an OCLC authority record, it automatically changes any linked headings in WorldCat bib records

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Why Control Headings?

- Verifies existing headings
- Automatically adds authorized headings to bib record
 - No copy/paste functions needed
- Helps database quality
 - Guarantees established headings appear in record
- Enriches the database

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When to Control Headings

- When adding original records to WorldCat
 - Contributes to database quality and enrichment
- When using an existing record
 - Control headings “on the fly” to verify their accuracy
 - Option: Replace master record with a record that has one or more controlled headings
 - Contributes to database quality and enrichment

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Replacing a Master Record

- Anyone with a full-level authorization can replace the master record **IF** controlling the heading does not change the heading content
- There is no enrichment credit associated with this

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Reminder

- Must be logged on (i.e. online) to control headings

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Control Headings

- Control all the headings
 - Edit → Control Headings → All
 - -or- <Shift+F11>
- Control headings individually
 - Place cursor in field
 - Edit → Control Headings → Single
 - -or- <F11>
 - -or- Use right-click mouse menu

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Control Headings, con't

- To edit a controlled heading
 - Must first uncontrol it
 - Edit → Control headings → Uncontrol Single -
or- Uncontrol All
 - Can also use right-click mouse menu to Uncontrol Single
- To replace, or lock and replace, a record
 - Under the Action menu, see:
 - Lock Master Record (optional)
 - Replace Record **-or-**
 - Replace and Update Holdings

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Controllable Fields

- 1XX
- 6XX
 - When second indicator is 0 or 4
- 7XX
- 8XX

- Subfields: x,v,y,z

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Fields that CANNOT be Controlled

- 240
- 4XX
- 6XX
 - When second indicator is 1, 2, 3, 5, 6, 7, 8

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Controlling Headings: Some Specific Circumstances

- When human intervention is needed, a Control Headings window opens
- No automatic control for unqualified personal names
 - Example: Goodwyn, Susan
- Controlling multipart headings (6XX field with second indicator 0 or 4)
 - Example: Women and literature †x History †y 20th century
 - Example: Grandmothers †z California †v Drama
- Add controlled and uncontrolled subfields
- Treatment of Relator subfields 4, e, and u

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Using the Control Headings Window: Some Examples

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Control Unqualified Name: #1a

245	0	0	Bluegrass goes to town #h [sound recording] : #b pop songs Buegrass style.
246	3	0	Pop songs Bluegrass style
260			Cambridge, Mass. : #b Rounder Records, #c p2002.

#####

700	1		Furtado, Tony.
700	1		Krauss, Alison, #d 1971-
700	1		Vincent, Rhonda.

Unqualified name

Control Single Heading
(use Edit menu, right-click mouse menu, or <F11>)

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Control Unqualified Name: #1b

Control Headings window opens

The screenshot shows a window titled "Control Headings". At the top, there is a legend with two items: "Single heading split by geographic" (highlighted in pink) and "Heading can be geographically subdivided" (highlighted in light blue). Below the legend, the "Original Heading" is "Vincent, Rhonda." and the "Modified Heading" is "Select Modify Heading for a main entry to start building new heading". There are "Undo" and "Insert Heading" buttons. A red arrow points to the "Insert Heading" button. Below this, a note in a yellow box says: "Note: Requested control is for an unqualified personal name". Underneath, there is a list with one item: "1. Vincent, Rhonda [700]". To the right of this list is a text box with the instruction: "Click on name to go to authority record. Is this the right person? If yes, click on *Insert Heading*." Below the list is a "New Query:" field containing "#a Vincent, Rhonda." and a "Match Best" button.

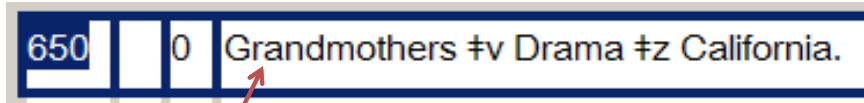
Control Unqualified Name: #1c

You are automatically returned to the bib record, and the heading is now controlled.

700	1	O'Brien, Tim, #d 1954-
700	1	Furtado, Tony.
700	1	Krauss, Alison, #d 1971-
700	1	<u>Vincent, Rhonda.</u>
700	1	Hartford, John.
700	1	Crowe, J. D.

A red arrow points to the row containing "Vincent, Rhonda.", which is highlighted with a blue border.

Incorrect Placement of Geographic Subdivision in Subject Heading: #2a



Subject Heading in bib record

Control Single Heading
(use Edit menu, right-click mouse menu, or <F11>)

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Incorrect Placement of Geographic Subdivision in Subject Heading: #2b

Control Headings window opens

Legend: Single heading split by geographic Heading can be geographically subdivided

This heading cannot be controlled as it is. → Original Heading: Grandmothers #v Drama #z California.

Modified Heading: Select Modify Heading for a main entry to start building new heading

Undo Insert Heading

Drama (see #4 below) cannot be geographically subdivided. (Note: it is not highlighted in blue-green).

Modify Heading Insert Heading

1. [Grandmothers #z California #v Drama](#) [650 Fully-controlled]
2. [Grandmothers #v Drama](#) [650 Fully-controlled]
3. [Grandmothers](#) [650]
4. [#v Drama](#) [Subdivision record]
5. [#z California](#) [Subdivision record]

You are given several controllable options. To choose one, click on its Insert Heading button.

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Incorrect Placement of Geographic Subdivision in Subject Heading: #2c

I chose the first option from the "Control Headings" window. I clicked *Insert Heading* beside #1 and was automatically returned to the bib record. You can see that the heading has been rearranged and is now controlled.

650 0 [Grandmothers †z](#) [California †v](#) [Drama.](#)

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Control Headings: Some Final Examples

- When a search or browse in the authority file retrieves too many records, try entering the word or phrase in a bibliographic record, then control that single field
- The Control Headings function does not interact with the Authority File in the same way that searching the Authority File does

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Sample Workflows - 1

- Copy Cataloging - Online
 - Find correct record in WorldCat
 - Edit
 - Control headings to check their accuracy
 - Update Holdings (or Produce and Update Holdings)

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Sample Workflows - 2

- Copy Cataloging - Online
 - Find correct record in WorldCat
 - Edit
 - Control headings
 - Replace and Update Holdings

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Sample Workflows - 3

- Copy Cataloging – Offline
 - Edit selected record in your local file
 - Logon (your open record will still be there)
 - Control Headings to check their accuracy
 - Update Holdings
 - **-OR-**
 - Logoff (your open record will still be there)
 - Update holdings by batch
- ***NOTE:** In this scenario, if you wish to replace the master record, you should logon and search for the record again.

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Sample Workflows - 4

- Original Cataloging
 - Create record (offline is assumed here)
 - Validate and Reformat
 - Save record to local file
 - Logon (your open record will still be there)
 - Control headings
 - Search WorldCat for the item one last time. If it hasn't been cataloged, return to your record and
 - Update Holdings (or Produce and Update Holdings)
 - Logoff

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Reporting Errors

- Change requests for authority record errors can be reported many different ways.
 - E-mail for authority records: authfile.oclc.org
 - Reporting directly from the Connexion records: Action → Report Error
 - Web forms: Authority Record Change Request:
<https://www3.oclc.org/app/authrec/>
 - Requests that require proof: toll-free FAX number 1-866-709-6252
- For more information, consult Chapter 5, *Quality Assurance, Bibliographic Formats and Standards*

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Resources

- *MARC 21 Format for Authority Data*
<http://www.loc.gov/marc/authority/ecadhome.html>
- Connexion Client HELP
 - Help → Client Help (<F1>) → Authorities

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Resources, con't

- OCLC Documentation for Authorities
 - *Authorities User Guide*, 3rd ed. rev.
<http://www.oclc.org/support/documentation/worldcat/authorities/userguide/default.htm>
 - Connexion Client Documentation: Authorities
<http://www.oclc.org/support/documentation/connexion/client/authorities/>
 - Section on controlling headings is entitled, "Use Authority Control for Bibliographic Records"

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Resources, con't

- *Controlling Headings in Bibliographic Records* (Tutorial)
<http://www5.oclc.org/downloads/tutorials/connexion/client/clctrlhdngs/ie5/index.html>
 - Take note of the System Requirements for this tutorial
<http://www5.oclc.org/downloads/tutorials/connexion/client/clctrlhdngs/index.html>
 - Shows how to control all headings with a single action, control a multiple subject heading, control a personal name heading, view a linked authority record, and more
 - Web-based
 - Approximate time to complete: 12 min.

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Resources, con't

- Consult the "Known Problems" list
http://www.oclc.org/connexion/support/client_known_problems.htm
- Note the Controlling Headings section

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Questions?

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