Policy on cataloging in Connexion

Beginning in 2018, the Harvard Library’s best practice is to catalog in Connexion. This recommendation came from the 2017 report: *Aligning the use of OCLC service offerings with Harvard Library organizational goals*. This allows Harvard to take advantage of, and contribute to, the larger world of collaborative cataloging that OCLC presents.

Exceptions to best practice of cataloging in Connexion:

- Metadata is added to Alma through vendor data loads. The preference is that suppliers create/enhance records in OCLC whenever possible.
- Record is a stub or provisional record and can safely be overlaid later.
- Local changes are limited to protected fields with subfield 5.
- Some special collections content overlaps with general collections, and cataloging practices differ for each. Cataloging for the former may involve the creation of access points for illustrators, printers, and binders who may not have name authority records. If an OCLC record is authenticated through the Program for Cooperative Cataloging (PCC), adding headings that do not have authority records is prohibited. Having to create name authority records for all unestablished illustrators, etc. is unsustainable for special collections units given current staffing and staff training constraints.
- There are cases where other institutions working in Connexion make changes that reflect their practices and priorities, which do not always match cooperative standards and practices. This is less of a concern for general collections, which are not tailored to the needs of special collections, where records are crafted to meet specific needs.
- These units often add specificity that is of interest to their discipline/community, but that may be deemed less important or irrelevant to general practitioners working in Connexion. While it is against community practice to remove data from OCLC master records unless it is unquestionably incorrect, it has been to known to happen and for some units this risk is deemed too great for rare, semi-rare, and unique material.