

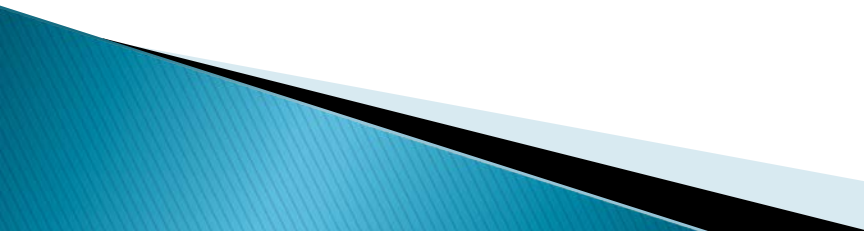
PDA and WorldCat Cataloging Partners: Making them Merge

CARLI PDA Forum
June 2, 2014
Susie Bossenga

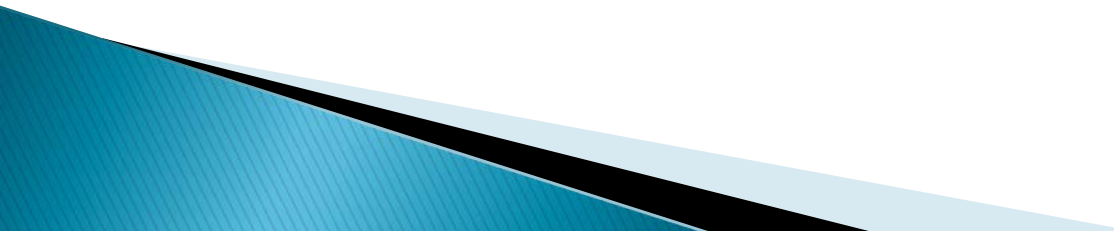
Overview of NEIU's PDA

- ▶ YBP as Vendor
- ▶ EBL Platform
- ▶ Discovery records from YBP, loaded weekly
- ▶ First batch of discovery records loaded May 2, 2013
- ▶ Included a retrospective load of titles that fit our profile going back to 2011
- ▶ Currently 26,000+ discovery records in our catalog
- ▶ Discovery records given unique location code (ddaebi)

Existing Workflow for Ebook Firm Orders

- ▶ Title ordered in GOBI
 - ▶ Acquisitions staff creates brief order record in Voyager and attaches PO
 - ▶ When access to title becomes available, title is activated in WorldCat Local Knowledgebase, triggering generation of record through OCLC's WorldShare Metadata
 - ▶ Cataloging staff overlay brief record with OCLC record and add call number and URL to MFHD
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Concerns about PDA Workflow

- ▶ Wanted to automate as much as possible to lighten workload on cataloging and acquisitions staff, especially during busy times in the year
 - ▶ Concerns about number of purchased titles growing over time as more and more discovery records are added to the catalog
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Workflow Challenges

- ▶ OCLC WorldShare Metadata not able to include order information in bibliographic records to facilitate automatic generation of POs in Voyager
- ▶ OCLC WorldCat Cataloging Partners not able to include customized URLs for our EBL ebooks in bibliographic records records

The Solution

- ▶ Use OCLC WorldCat Cataloging Partners
 - Records include order data needed to generate PO
 - 856 fields stripped out of record by OCLC because they did not contain our customized URL
 - Use Voyager merge bibliographic deduplication profile to merge custom URL in 856 field from discovery record into OCLC record for purchased title during the overlay process

How to Set it Up

- ▶ Create a new bibliographic duplicate detection profile
 - Select Merge as the option for duplicate handling
 - Select option to discard incoming records that do not match existing records
 - Duplicate replace value = 100
 - Duplicate warn value = 100
 - In field definitions tab, select 024A to match incoming records
 - Quality Hierarchy tab = leave blank
 - Merge Fields = 856 40 field

How to Set it Up

- ▶ **Create Bulk Import Rule**
 - Select the merge duplicate detection profile you just created as the bib dup profile
 - Check box for Bibs, MFHDs, POs
 - Fill in other information as appropriate to your library

- For additional information on creating Bibliographic Duplication Detection Profiles and Bulk Import Rules, see Chapter 4 of the Voyager System Administration User's Guide

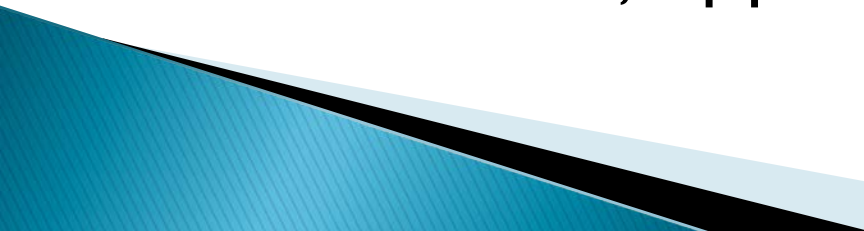
How to Set it Up

- ▶ Set up tech specs with YBP for records from OCLC WorldCat Cataloging Partners
 - Request that DDA records be sent in a separate file with a different file extension than other records because they will be loaded using a different profile (we split files by account number)
 - Vendor book number mapped to 024 8_ \$a to use as match point with discovery records
 - Map order data (price, fund codes) to appropriate fields
 - Delete 856 fields

How to Set it Up

- ▶ Complete CARLI WRO for Voyager Bulk Import for Electronic Resources.
 - Use the merge bulk import rule
 - Make sure the file for DDA records uses a different extension than other records
 - Test.

Workflow for Titles Purchased through DDA

- ▶ DDA Discovery record loaded into catalog
 - ▶ Purchase is triggered by patron
 - ▶ File containing bibliographic record loaded into Voyager, overlaying DDA Discovery Record, creating MFHD and PO
 - ▶ Cataloging staff deal with error reports from bulk load
 - ▶ When invoice is received, acquisitions staff verify access to title, delete DDA MFHD, receive item, approve PO, and attach invoice.
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Questions?

- ▶ Susie Bossenga, Serials & E-Resources Management Librarian, Northeastern Illinois University
- ▶ s-bossenga@neiu.edu