OCLC’s WorldShare Metadata Collection Manager Service

A New Tool for Shared Bibliographic Maintenance,
Or,
BibNote on Steroids

John A. Whisler
Eastern Illinois University
For the I-Share Technical Services Committee Fall Webinar
October 2013
A Little History

BibNote Service lets libraries get fresh bibs when limited changes happened
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2004 ILLINET negotiates OCLC Group Services
Pricing- BibNote included
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2009 OCLC Wiki-izes WorldCat (Expert Community Experiment)
A Little History

2013 OCLC announces new WorldShare Metadata Collection Manager service with rich selection and formatting criteria

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Your Catalog Gets Updated

I-Share Catalog Gets Updated
How Can We Participate?
CARLI Website Has the Details

- [http://www.carli.illinois.edu/products-services/i-share/cat/oclc-bibnotif](http://www.carli.illinois.edu/products-services/i-share/cat/oclc-bibnotif)

- At this website are directions for setup and use of the service
  - Starting or migrating to the service
  - Customizing settings for receiving records
  - Setting up delivery
  - Loading records into your local Voyager database
  - Cleanup
Starting:
Set up Service with OCLC

• For new users:

• For former BibNote users:
  – see OCLC’s migration webinar link
Configuring: Customize Records

Enable MARC Record Delivery
- Yes
- No

Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system.
OCLC Symbol: IAD

Customize Records

Options for All Collections
- Holding Library Code (049 $a)
  - [ADA]

Delete Fields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>029</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>891</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>938</td>
<td>Any</td>
<td>Any</td>
</tr>
</tbody>
</table>

Delete Subfields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Subfield</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Any</td>
<td>Any</td>
<td></td>
</tr>
</tbody>
</table>

Add Fields

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Subfield</th>
<th>Value</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Blank</td>
<td>Blank</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Customize 856 Field for Standard Collections

Add Subfields

<table>
<thead>
<tr>
<th>Subfield</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>u</td>
<td>[KB URL]</td>
</tr>
</tbody>
</table>
Configuring: WorldCat Updates

Enable MARC Record Delivery

- Yes
- No

Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system. OCLC Symbol IAD

Updates

Select the option for WorldCat Updates.

- None
- Based on changes to WorldCat master records for my knowledge base Standard and WorldCat Query collections
- Based on changes to WorldCat master records for my knowledge base Standard and WorldCat Query collections and my WorldCat holdings

Include WorldCat updates for specified OCLC symbols

IAD

Separate each OCLC symbol with a space.

Update Conditions

Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.

- Any change to the WorldCat master record
- Select options for specific changes to the WorldCat master record
Configuring: WorldCat Updates

**Update Conditions**
Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.

- Any change to the WorldCat master record
- Select options for specific changes to the WorldCat master record

**Specify Including Conditions**

**Variable Fields**
Deliver records if the following fields are added, updated, or deleted in the master record:

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>7</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>8</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

**Encoding Levels**
Deliver records if the Encoding Level changes to the following value(s):

- Blank
- I
- K
- L
- M

**Other Options**
Deliver records if the:
- Date/Publication Status (DtSt) changes
Configuring: Record Delivery

Enable MARC Record Delivery
- Yes
- No

Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system.

OCLC Symbol IAD

Record Standard
- MARC 21 with UTF-8 Unicode

CARLI recommended setting

Delivery Frequency
- Weekly

Your choice

Delivery File Output
- Deliver my serials in a separate file (.ser)
- Deliver records for WorldCat holdings collection in a separate file (.wcholdings)

Consider
Configuring: Reports

Enable MARC Record Delivery

Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system. OCLC Symbol IAD

Customize Records | WorldCat Updates | Record Delivery | Reports

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

Receive reports via email

Cataloging Authorization

Only authorization code is required, ex. 100011200.

Report Types

- Daily Deleted Records
- Daily New Records
- Daily Updated Records
- Monthly Record Summary

- Daily WorldCat Holdings
- Monthly WorldCat Holdings

Email Address(es)

Separate multiple email addresses with semi-colon.

Report Format

HTML

Receive Report As

Email Attachment

Excel

Hyperlink
Record Delivery

• Records are placed in files on the OCLC Data Exchange Server and can be retrieved using FTP. OCLC will supply your unique user name and password in your Welcome Guide.

• A statistical report is generated for each file, and is placed in the OCLC Usage Statistics Portal at http://www.stats.oclc.org/cusp/nav Your 9-digit OCLC cataloging authorization and password gives you access.
Record Delivery: OCLC’s Data Exchange Server
# Record Delivery: Statistics

## Daily Updated Records -- Collection Manager

- **Reporting Period:** August 16, 2013 - August 16, 2013
- **Institution:** Eastern Illinois Univ
- **Symbol:** IAD

### Total number of records: 229

<table>
<thead>
<tr>
<th>Provider</th>
<th>Collection name</th>
<th>Title</th>
<th>ISBN/ISSN</th>
<th>OCLC number</th>
<th>File Name</th>
<th>Action</th>
<th>Update Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>I'll get there, it better be worth the trip</td>
<td>00005371</td>
<td>metacoll.IAD.updates.D20130816.T050015.1.mrc</td>
<td>UPDATED</td>
<td>Master record variable field(s) change: 300, 520, [x]</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Racial thought in America</td>
<td>00044340</td>
<td>metacoll.IAD.updates.D20130816.T050015.1.mrc</td>
<td>UPDATED</td>
<td>Master record variable field(s) change: 505</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The two sieges of Rhodes, 1480-1522</td>
<td>ISBN 0719518946</td>
<td>00048290</td>
<td>metacoll.IAD.updates.D20130816.T050015.1.mrc</td>
<td>UPDATED</td>
<td>Master record variable field(s) change: 336, 337, [x]</td>
</tr>
</tbody>
</table>
Record Delivery: Statistics

![Export button highlighted on a Connexion interface]

<table>
<thead>
<tr>
<th>File Name</th>
<th>Action</th>
<th>Update Reason</th>
<th>Multiple occurrence</th>
</tr>
</thead>
<tbody>
<tr>
<td>metacoll.IAD.updates.D20130816.T050015.1.mrc</td>
<td>UPDATED</td>
<td>Master record variable field(s) change: 300, 520, [....]</td>
<td>N</td>
</tr>
</tbody>
</table>
Loading Records into Voyager

• Manual loads – You retrieve records from the OCLC Exchange server via FTP and save them to your database one at a time.

• Bulk loads – CARLI does the work (most of it) for you.
Manual Loading

• Consider using a distinctive operator ID. This will allow you to identify records touched by the service and make them retrievable through Access queries.
Manual Loading

- Retrieve records from OCLC’s FTP server.
Manual Loading

• File is now downloaded to my selected folder
Manual Loading

**Session Defaults and Preferences**

- **Holdings/Item default location:** Stacks
- **Call Number Hierarchies:** LC
- **Bibliographic Import/Replace Profile:** OCLCConditional
- **Authority Import/Replace Profile:** AuthReplace

- **Delete records from work files once saved to database**
- **Delete records from import file once saved to database**
- **Add a subfield 'a' to a new field**
- **Display MARC Views maximized**

*CARLI recommended setting*
Manual Loads

• When manually loading records, duplicate detection will result in one of four outcomes:
  – Incoming bib matches one existing bib at a weight of 100 or more
  – Incoming bib matches an existing bib at a weight of less than 100
  – Incoming bib does not match any existing bib and is saved as a new record
  – Incoming bib matches more than one existing bib at a weight of 100 or more
Bulk Loads

• System Administration preparations are documented on the CARLI web page
  http://www.carli.illinois.edu/products-services/i-share/cat/oclc-bibnotif

  – Create Bib Dup Detection Profile ReplaceNoAdd
  – Create Bulk Import Rule BibNoteREPUnicode
Bulk Loads

• File an online work request (WRO) with CARLI

  – Follow the instructions at the CARLI web page for filing the work request.
Bulk Loads

• One-time loads
  – You may download a file from the OCLC FTP site to your computer, then re-FTP the file to the CARLI FTP site. You can re-name the file if you want.

• Recurring loads
  – Share your OCLC FTP logon and password with CARLI and they can automatically retrieve and process your files.
When files are bulk loaded using the suggested duplicate detection and bulk import settings, Voyager duplicate detection will result in one of three outcomes:

- Incoming bib will match one bib at a weight of 100 or more
- Incoming bib will not match any bib at a weight of 100 or more
- Incoming bib will match more than one bib at a weight of 100 or more
Bulk Loads: Cleanup

• Working with the Discard file
  – CARLI will place the Discard file in your CARLI FTP server following each bulk load
  – You can retrieve the file and open it with NotePad or another plain text editor. You will see the full MARC record for each discarded bib.
  – Most problems should be one of these three:
    • OCLC number changes
    • Forgotten OCLC cancellations
    • Multiple matches
**Bulk Loads: Cleanup**

- OCLC number changes

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td></td>
<td>ocm24549374</td>
</tr>
<tr>
<td>003</td>
<td></td>
<td>OCoLC</td>
</tr>
<tr>
<td>005</td>
<td></td>
<td>20130919014952.0</td>
</tr>
<tr>
<td>007</td>
<td></td>
<td>sd zmnznmlnle</td>
</tr>
<tr>
<td>008</td>
<td></td>
<td>9011151990  caunn.nn i pf n eng</td>
</tr>
<tr>
<td>010</td>
<td></td>
<td>$a 90741371</td>
</tr>
<tr>
<td>040</td>
<td></td>
<td>$aDLC$beng$cDLC$dGZR$dDPL$dBAKER$dVT2$dOCLCQ$dBCTA$dOCLCG$doCLCO$DULN$dTXIS$dmuo</td>
</tr>
<tr>
<td>019</td>
<td></td>
<td>$a22299131$a29445129</td>
</tr>
<tr>
<td>020</td>
<td></td>
<td>$a97809350589028</td>
</tr>
<tr>
<td>024</td>
<td></td>
<td>$a081227093921</td>
</tr>
<tr>
<td>028</td>
<td>02</td>
<td>$aR2-70939$bRhino word Beat</td>
</tr>
<tr>
<td>033</td>
<td>0</td>
<td>$a1958----</td>
</tr>
<tr>
<td>033</td>
<td>0</td>
<td>$a19590513</td>
</tr>
<tr>
<td>043</td>
<td></td>
<td>$an-us----</td>
</tr>
<tr>
<td>050</td>
<td>00</td>
<td>$aRZA 6243</td>
</tr>
<tr>
<td>082</td>
<td>04</td>
<td>$a818.54</td>
</tr>
<tr>
<td>049</td>
<td></td>
<td>$aIADA</td>
</tr>
<tr>
<td>100</td>
<td>1</td>
<td>$aKerouac, Jack,$d1922-1969.</td>
</tr>
<tr>
<td>245</td>
<td>14</td>
<td>$aThe Jack Kerouac collection$h[sound recording].</td>
</tr>
</tbody>
</table>

---

**Note:** The above text includes a table with field tags and their corresponding contents. The marked field with the OCLC number change is highlighted for emphasis.
Bulk Loads: Cleanup

- Forgotten OCLC cancellations
Bulk Loads: Cleanup

- Multiple matches

<p>| Record #: | 4 |
| Leader:   | 01595cam a2200373 a 4500 |
| Fields:   | |</p>
<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td></td>
<td>ocm51035617</td>
</tr>
<tr>
<td>003</td>
<td></td>
<td>OCoLC</td>
</tr>
<tr>
<td>005</td>
<td></td>
<td>20130919014955.0</td>
</tr>
<tr>
<td>006</td>
<td>m</td>
<td>o df</td>
</tr>
<tr>
<td>007</td>
<td>cr mn</td>
<td></td>
</tr>
<tr>
<td>008</td>
<td></td>
<td>021119s2002 dcua ob f000 0 eng c</td>
</tr>
<tr>
<td>040</td>
<td></td>
<td>$aGPO$bgGPO$gEIA$dOCLCQ$dGPO</td>
</tr>
<tr>
<td>019</td>
<td></td>
<td>$a56315478</td>
</tr>
<tr>
<td>042</td>
<td></td>
<td>$apcc</td>
</tr>
<tr>
<td>043</td>
<td></td>
<td>$an-us---</td>
</tr>
<tr>
<td>074</td>
<td></td>
<td>$a0473-A-01 (online)</td>
</tr>
<tr>
<td>074</td>
<td></td>
<td>$a0473-E (online)</td>
</tr>
<tr>
<td>086</td>
<td>0</td>
<td>$aEP 8.2:2004025128$zEP 2.2:2003002873</td>
</tr>
<tr>
<td>088</td>
<td></td>
<td>$aEPA-842-B-02-002</td>
</tr>
<tr>
<td>049</td>
<td></td>
<td>$aIAADA</td>
</tr>
<tr>
<td>100</td>
<td>1</td>
<td>$aWoodley, James.</td>
</tr>
<tr>
<td>245</td>
<td>10</td>
<td>$aAssessing and monitoring floatable debris$h[electronic resource].</td>
</tr>
<tr>
<td>260</td>
<td></td>
<td>$aWashington, DC: $bOceans and Coastal Protection Division</td>
</tr>
</tbody>
</table>
Bulk Loads: Cleanup

- Saving paper...

```plaintext
Record #: 1
Leader: 01857cim a2200445 a 4500
Fields:
Tag    Ind    Contents
      ===    ===========
001    ocm24549374 $a22299131$a29445129
003    OCoLC
005    20130919014952.0
007    sd zmznznm9nle|
008    901115s1990 caunnm i pf n eng
010    $a 90741371
040    $aDLC$bceng$cDLC$cdGZR$ddPL$dBaker$dvT2$doCLCQ$dBTCAt$doCLCG$dOCLCO$duLN$dTXI$dMUO
019    
020    $a0930589025
020    $a9780930589028
024    $a081227093921
```
Bulk Loads: Cleanup

• Saving paper...

```plaintext
untitled - notepad
File Edit Format View Help
ocm24549374 $a22299131$a29445129
ocm34543149 $a249155$a4049549$a22557547$a34775827$a182914007$a264698647$
a427569709$a559511828$a832835451
ocm38369004 $a38364558

untitled - notepad
File Edit Format View Help
pcm24549374 22299131 29445129
ocm34543149 249155 4049549 22557547 34775827 182914007 264698647$
a427569709 559511828 832835451
ocm38369004 38364558
```
Bulk Loads: Cleanup

• Saving paper...

```
01067188
06224183
41555949
41880401
41886270
41892514
47757918
59836644
133131125
```

```
#01067188
#06224183
#41555949
#41880401
#41886270
#41892514
#47757918
#59836644
#133131125
```
Bulk Loads: Cleanup

• Cleanup sounds like a lot of work—do I have to?
  – Stop your whining, it’s good for your database
  – The same problems may come back again and again if you don’t fix them

• But seriously, if you can’t do it, you’re no worse off...
  – Identified problems were there all along
  – Bulk loads do not create new cases of the Discard file problems
What Are the Benefits?

• Expanded coverage – I’m receiving about 30 times more records per week
What Are the Benefits?

• From a recent load, I received records because of changes in these areas:
What Are the Risks?

- Loss of local edits
- Consumption of time
- Introduction of questionable data
What I Hope Will Happen

• I-Share libraries will improve OCLC master records whenever possible
  – Make edits that are universally applicable in the OCLC master record, where they’re available for the benefit of all
  – Put as much local data as possible in Voyager holding records rather than bibs

• I-Share libraries will subscribe to the Collection Manager service
  – Your edits, along with OCLC’s enhancements, come into our local catalogs automatically, then improve the I-Share catalog as well
Questions?

- Email: support@carli.illinois.edu
- Subject line: Collection Manager webinar