

# OCLC's WorldShare Metadata Collection Manager Service

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

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For the I-Share Technical Services Committee Fall Webinar  
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# A Little History

BibNote Service lets  
libraries get fresh bibs  
when limited changes  
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2009 OCLC Wiki-izes WorldCat (Expert Community Experiment)

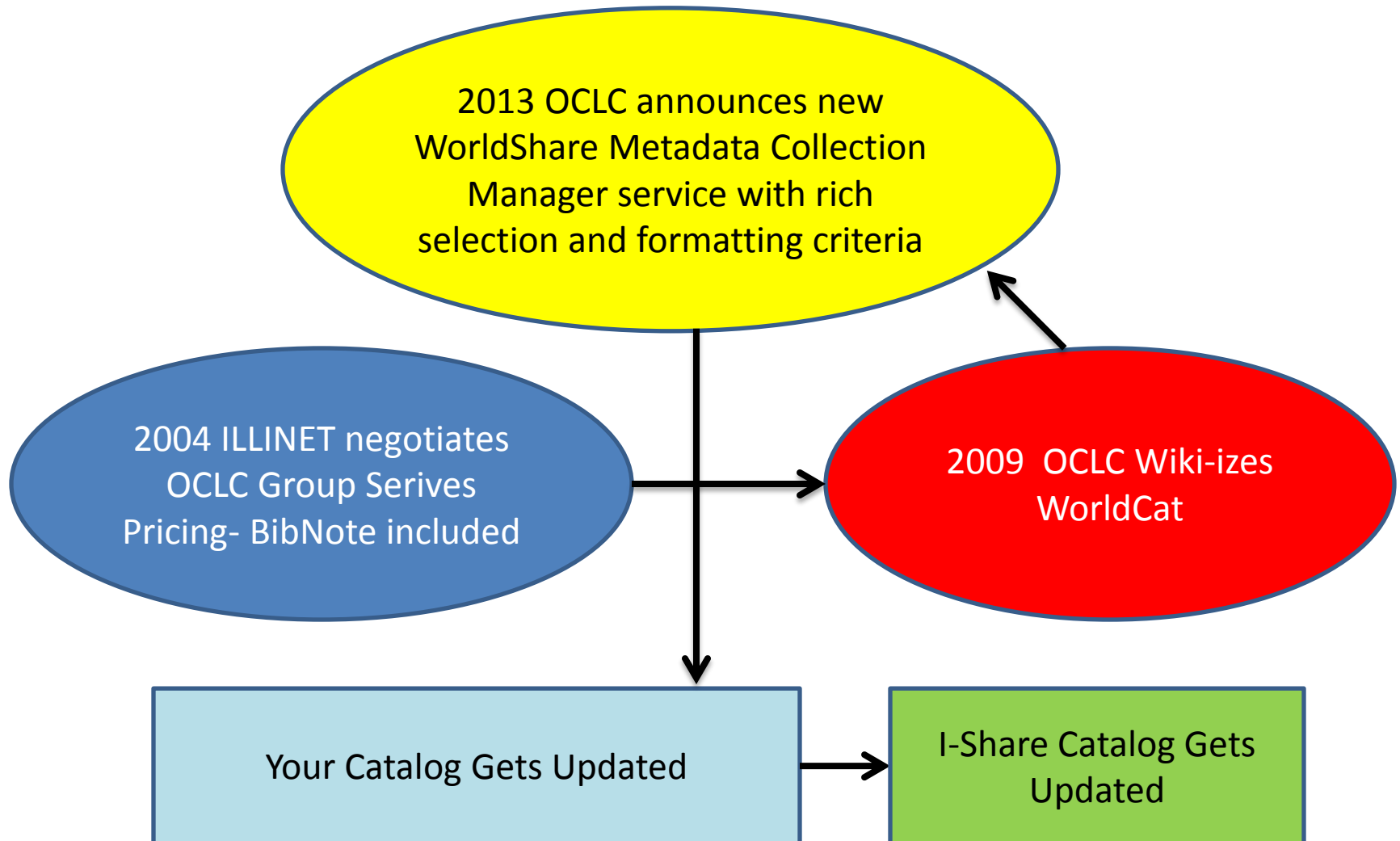
# A Little History

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

2004 ILLINET negotiates  
OCLC Group Services  
Pricing- BibNote included

2009 OCLC Wiki-izes  
WorldCat

# A Little History



# How Can We Participate?

## CARLI Website Has the Details

- <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:
  - <https://www.oclc.org/worldshare-metadata/collection-manager/getting-started.en.html>
- For former BibNote users:
  - <https://www.oclc.org/en-US/worldshare-metadata/migration.html#BibNote>
  - see OCLC's migration webinar link



# Configuring: Customize Records

Enable MARC Record Delivery

Yes  No

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

Options for All Collections

Holding Library Code (049 \$a)  
IADA

Delete Fields

| Tag | Ind 1 | Ind 2 |   |
|-----|-------|-------|---|
| 029 | Any   | Any   | + |
| 891 | Any   | Any   | - |
| 938 | Any   | Any   | - |

Delete Subfields

| Tag | Ind 1 | Ind 2 | Subfield |   |
|-----|-------|-------|----------|---|
|     | Any   | Any   |          | - |

Add Fields

| Tag | Ind 1 | Ind 2 | Subfield | Value | Tag |
|-----|-------|-------|----------|-------|-----|
|     | Blank | Blank |          |       | +   |

Customize 856 Field for Standard Collections

Add Subfields

| Subfield | Value    |   |
|----------|----------|---|
| u        | [KB URL] | + |

Customize the 856 Field for all WorldCat Query Collections and WorldCat Holdings

# 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

Customize Records

WorldCat Updates

Record Delivery

Reports

## 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:

| Tag         | Ind 1 | Ind 2 |   |
|-------------|-------|-------|---|
| 1 ▾ X ▾ X ▾ | Any ▾ | Any ▾ | + |
| 5 ▾ 0 ▾ 5 ▾ | Any ▾ | Any ▾ | - |
| 6 ▾ X ▾ X ▾ | Any ▾ | Any ▾ | - |
| 7 ▾ X ▾ X ▾ | Any ▾ | Any ▾ | - |
| 2 ▾ 4 ▾ 0 ▾ | Any ▾ | Any ▾ | - |
| 8 ▾ 3 ▾ 0 ▾ | Any ▾ | Any ▾ | - |
| 5 ▾ 2 ▾ 0 ▾ | Any ▾ | Any ▾ | - |
| 3 ▾ X ▾ X ▾ | Any ▾ | Any ▾ | - |

### Encoding Levels

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

- Blank    1    4    5    7    8  
 I    K    L    M

### Other Options

Deliver records if the:

- Date/Publication Status (DtSt) changes

# Configuring: Record Delivery

Yes  No

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

Record Standard

MARC 21 with UTF-8 Unicode

CARLI recommended setting

Delivery Frequency

Select the file delivery frequency for all KB standard collections, ongoing WorldCat query collections, and WorldCat holdings collection.

Weekly

Your choice

Note: For KB standard collections and ongoing WorldCat query collections, the frequency can be overridden at the individual collection level.

Delivery File Output

Set up separate delivery for records that meet selected criteria.

Deliver my serials in a separate file (.ser)

Deliver records for WorldCat holdings collection in a separate file (.wcholdings)

Consider

# Configuring: Reports

Yes  No

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  Yes  No

Customize Records | WorldCat Updates | Record Delivery | Reports

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

Receive reports via email  Yes  No

Cataloging Authorization

*Only authorization code is required, ex. 100011200.*

Report Types

|   |  |
|---|--|
| <input type="checkbox"/> Daily Deleted Records  | <input type="checkbox"/> Daily WorldCat Holdings   |
| <input type="checkbox"/> Daily New Records      | <input type="checkbox"/> Monthly WorldCat Holdings |
| <input type="checkbox"/> Daily Updated Records  |  |
| <input type="checkbox"/> Monthly Record Summary |  |

Email Address(es)

*Separate multiple email addresses with semi-colon.*

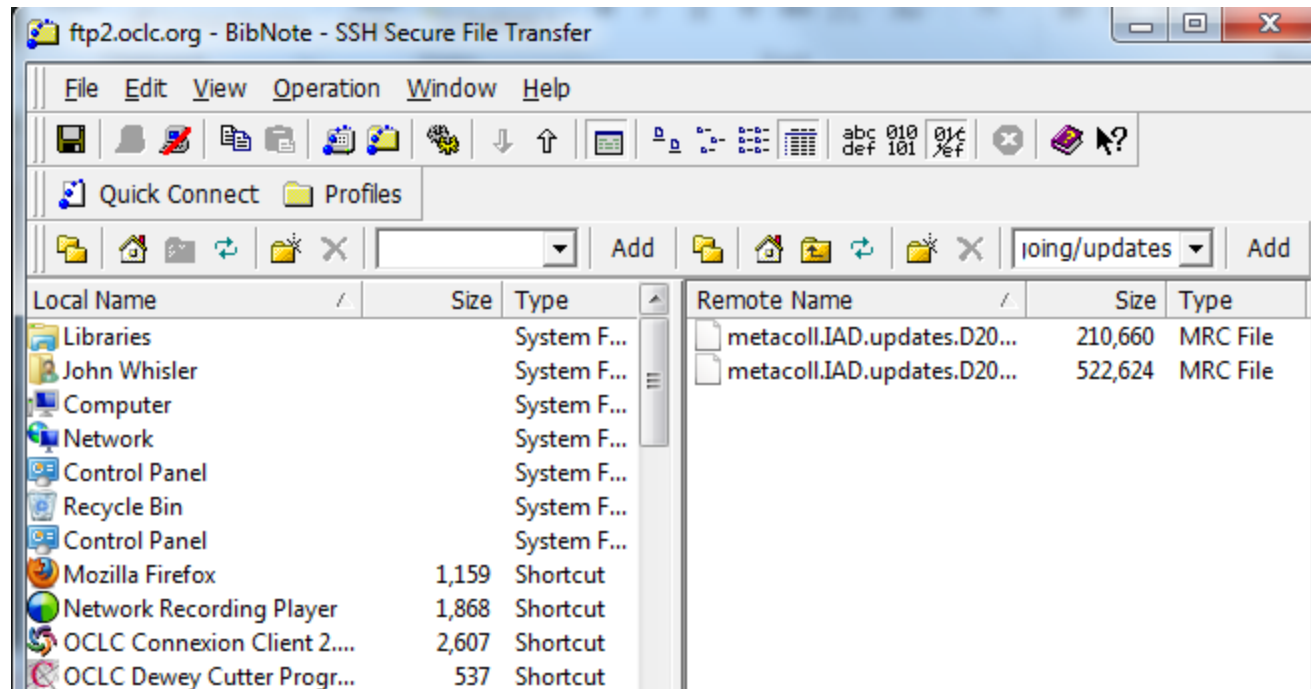
Report Format  HTML  Excel

Receive Report As  Email Attachment  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

Start Date:

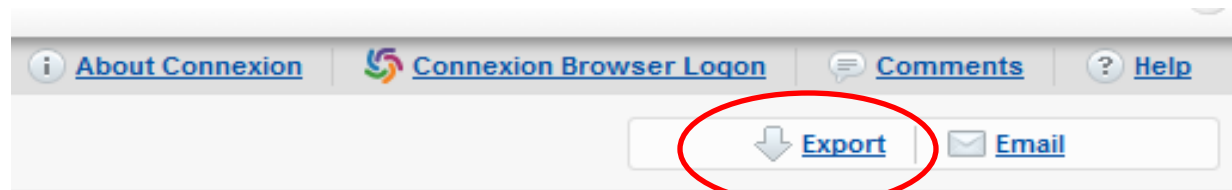
Days:

Total number of records: 229

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



# Record Delivery: Statistics



| File Name                                    | Action  | Update Reason   | Multiple occurrence |
|--|---------|---|---------------------|
| metacoll.IAD.updates.D20130816.T050015.1.mrc | UPDATED | Master record variable field(s) change: 300, 520, [...] | N                   |

# Loading Records into Voyager

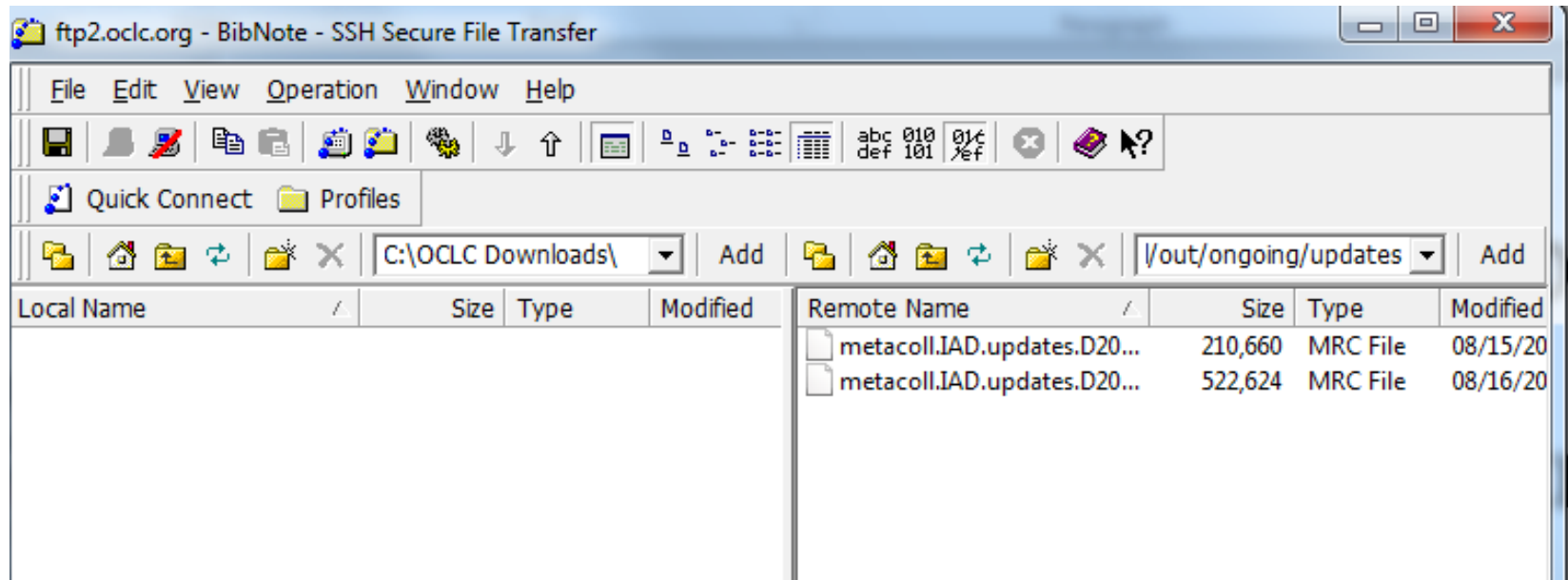
- Manual loads – You retrieve records from the OCLC Exchange server via FTP and save them to your database one at a time.
- Bulk loads – CARLI does the work (most of it) for you.

# 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.

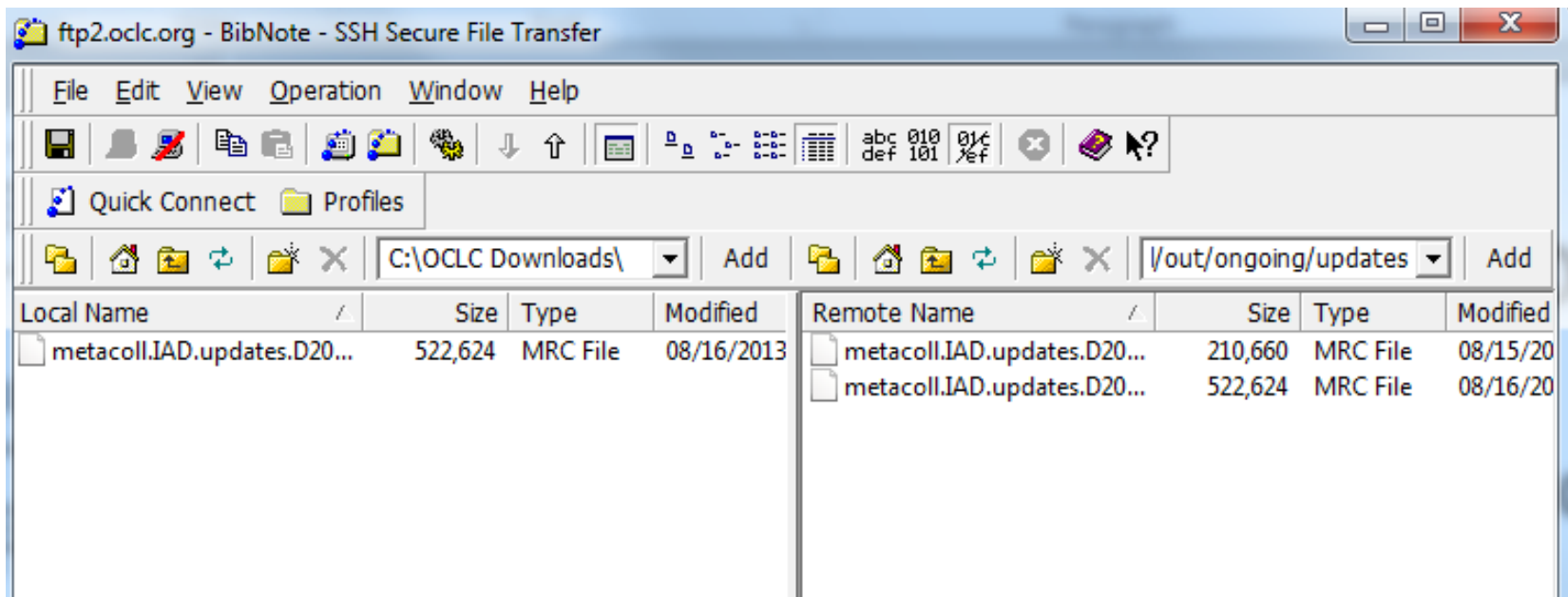
# Manual Loading

- Retrieve records from OCLC's FTP server.



# Manual Loading

- File is now downloaded to my selected folder



# Manual Loading

Session Defaults and Preferences

General | Validation | Work Flow | Item Defaults | Folders/Files | Mapping | Colors/Fonts

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 BibNoteREPUunicode



# 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

# Bulk Loads - Processing

- 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

```
rt62420_discard - Notepad
File Edit Format View Help
Record #: 1
Leader : 01857cim a2200445 a 4500
Fields :
Tag Ind Contents
====
001 ocm24549374
003 OCoLC
005 20130919014952.0
007 sd zmnznm|ne|
008 901115s1990 caunnnn i pf n eng
010 || $a 90741371
040 || $aDLC$beng$cDLC$dGZR$dDPL$dBAKER$dVT2$dOCLCQ$dBTCTA$dOCLCG$d
OCLCO$dULN$dTYI$dMUO
019 || $a22299131$a29445129
020 || $a0930589025
020 || $a9780930589028
024 1| $a081227093921
028 02 $aR2-70939$bRhino word Beat
033 0| $a1958----
033 0| $a19590513
043 || $an-us---
050 00 $aRZA 6243
082 04 $a818.54
049 || $aIADA
100 1| $aKerouac, Jack,$d1922-1969.
245 14 $aThe Jack Kerouac collection$h[sound recording].
250 || $a1958 ed
```

# Bulk Loads: Cleanup

- Forgotten OCLC cancellations

```
rt62420_discard - Notepad
File Edit Format View Help
994  ||  $aC0$bIAD

Record #: 7
Leader : 02357ccm a22004091 4500
Fields :
Tag Ind Contents
====
001 ocm05847838
003 OCoLC
005 20130919014956.0
008 790723s1941 nyuopc n eng
010 || $a 41025370
040 || $aDLC$beng$cDLC$dOCL$dOCLCQ$dUOK$dMUQ$dOCLCQ$dOCLCG$dOCLCA$d
YUU$dSVP$dCNO$dNZCPL$dSINLB$dICN$dOCLCO$dOCLCA$dJRK$dOCLCA
019 || $a1078538$a6866771$a19728072$a21452322$a21940197$a42238657$a
51828822$a56257148
028 22 $a39001$bG. Schirmer, inc.
028 32 $aEd. 1673$bG. Schirmer, Inc.
045 || $aw6x0
050 04 $aM1503.s949$bG55
082 || $a782.6
049 || $aIADA
100 1| $aSullivan, Arthur,$d1842-1900.
240 10 $aGondoliers.$svocal score
245 14 $aThe gondoliers, or, The king of Baratavia.$cBook by w.s. G
```

# Bulk Loads: Cleanup

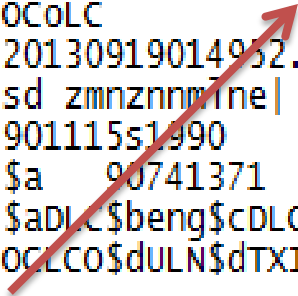
- Multiple matches

```
Record #: 4
Leader : 01595cam a2200373 a 4500
Fields :
Tag Ind Contents
====
001 ocm51035617
003 OCoLC
005 20130919014955.0
006 m o d f
007 cr mn|||||
008 021119s2002 dcua ob f000 0 eng c
040 $aGPO$beng$cGPO$dEIA$doCLCQ$dGPO
019 $a56315478
042 $apcc
043 $an-us---
074 $a0473-A-01 (online)
074 $a0473-E (online)
086 0 $aEP 8.2:2004025128$zEP 2.2:2003002873
088 $aEPA-842-B-02-002
049 $aIADA
100 1 $awoodley, James.
245 10 $aAssessing and monitoring floatable debris$h[electronic res
ource].
260 11 $awashington, dc : $bGPO and Coastal protection division
```

# Bulk Loads: Cleanup

- Saving paper...

```
Record #: 1
Leader : 01857cim a2200445 a 4500
Fields :
Tag Ind Contents
====
001 ocm24549374 $a22299131$a29445129
003 OCoLC
005 20130919014952.0
007 sd zmnznm|ne|
008 901115s1990 caunnnn i pf n eng
010 || $a 90741371
040 || $aDLC$beng$cDLC$dGZR$dDPL$dBAKER$dVT2$doCLCQ$dbTCTA$doCLCG$d
OCLCO$dULN$dTXI$dMUO
019 ||
020 || $a0930589025
020 || $a9780930589028
024 1| $a081227093921
```





# Bulk Loads: Cleanup

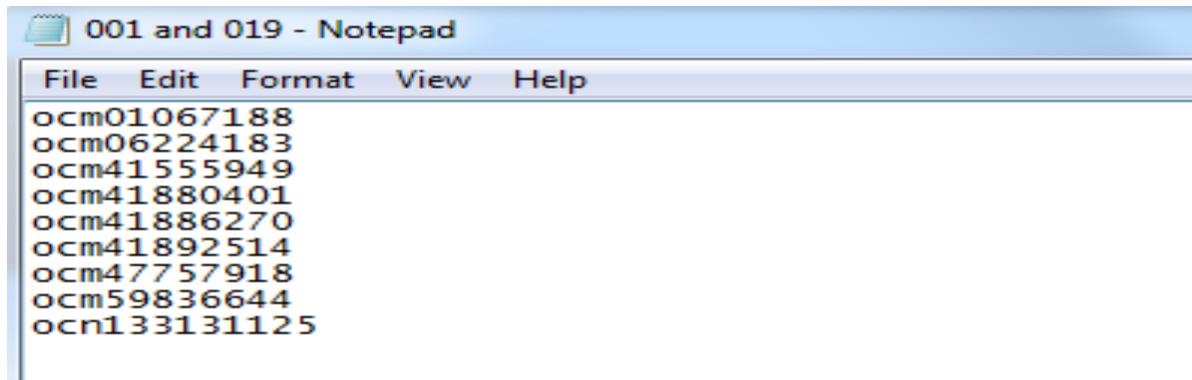
- Saving paper...

```
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
```

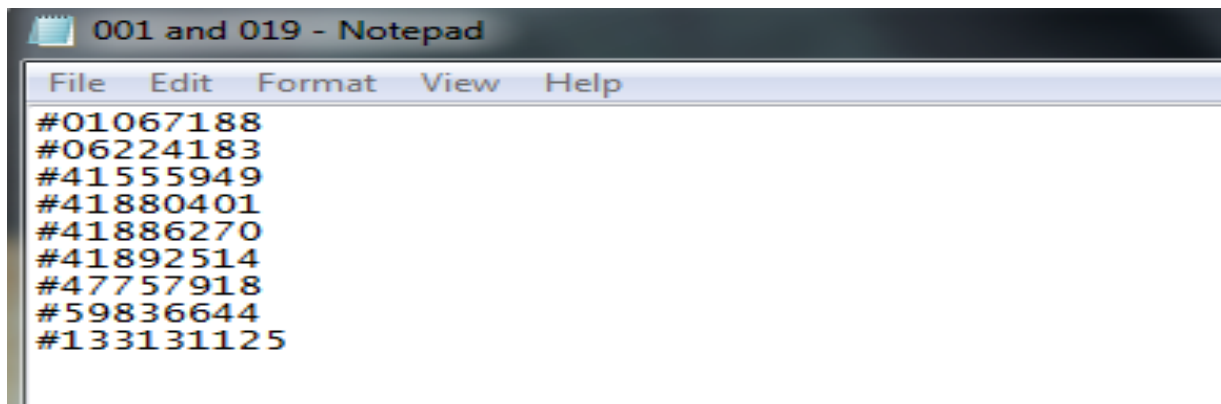
# Bulk Loads: Cleanup

- Saving paper...



A screenshot of a Notepad window titled "001 and 019 - Notepad". The window has a menu bar with "File", "Edit", "Format", "View", and "Help". The text content is as follows:

```
ocm01067188  
ocm06224183  
ocm41555949  
ocm41880401  
ocm41886270  
ocm41892514  
ocm47757918  
ocm59836644  
ocn133131125
```



A screenshot of a Notepad window titled "001 and 019 - Notepad". The window has a menu bar with "File", "Edit", "Format", "View", and "Help". The text content is as follows:

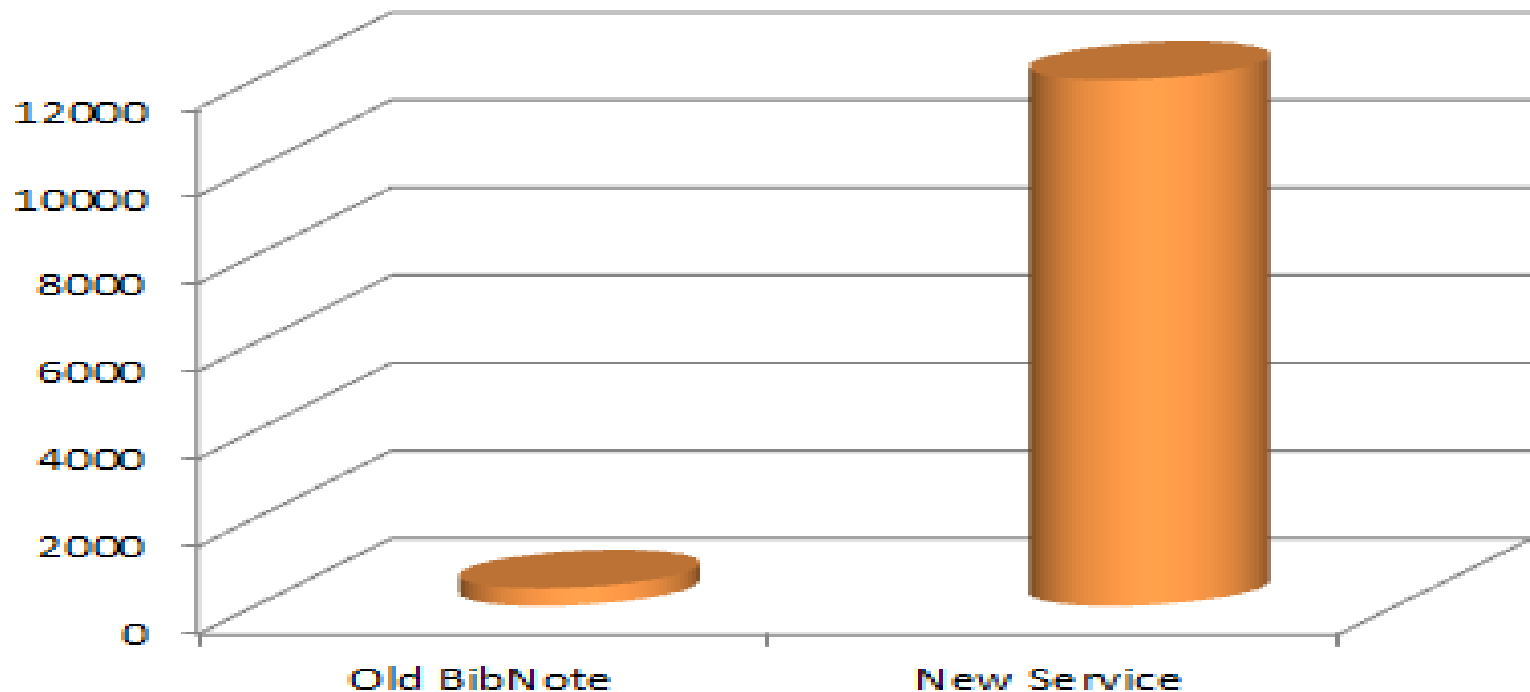
```
#01067188  
#06224183  
#41555949  
#41880401  
#41886270  
#41892514  
#47757918  
#59836644  
#133131125
```

# 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

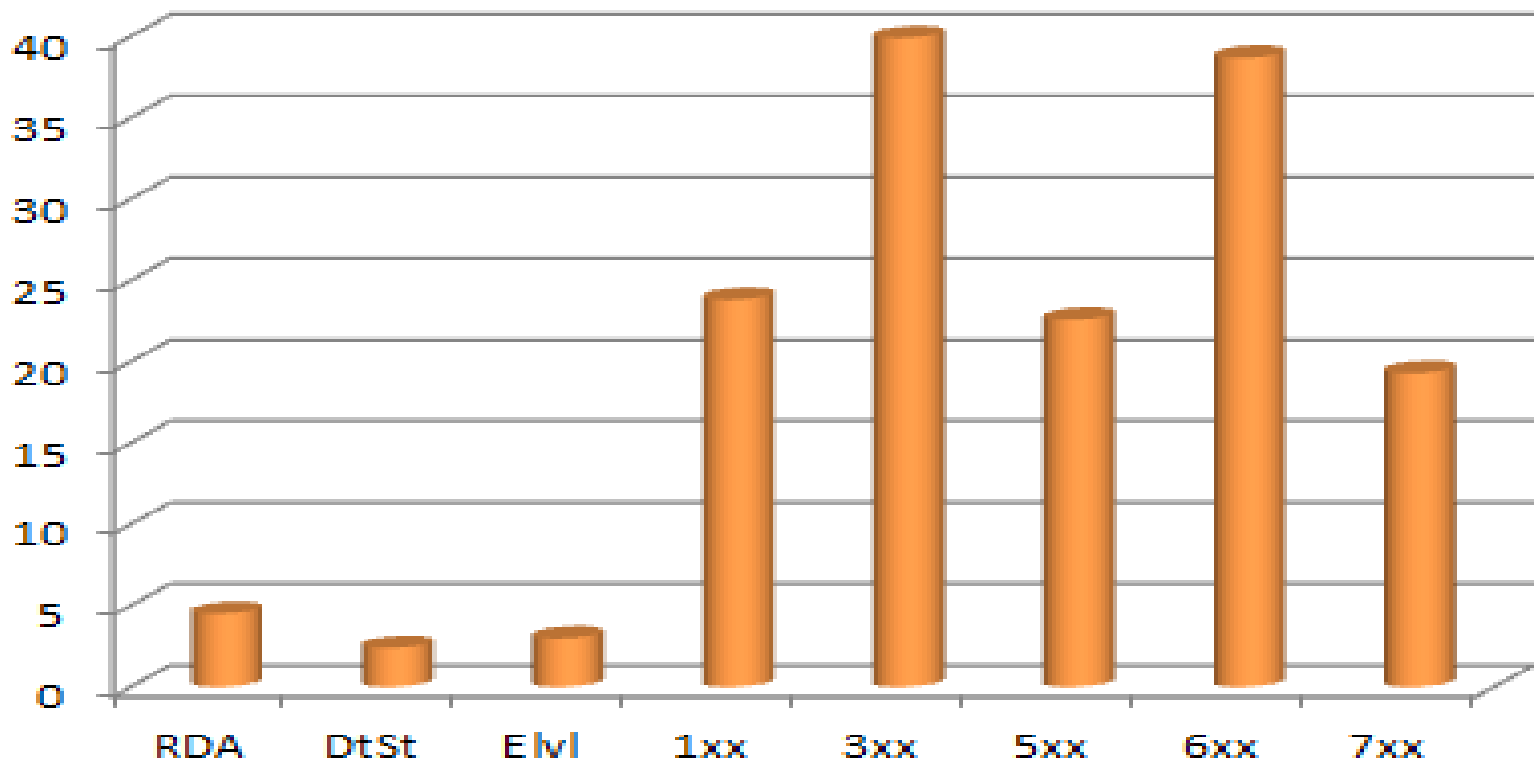
# What Are the Benefits?

- 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](mailto:support@carli.illinois.edu)
- Subject line: Collection Manager webinar