

WorldCat Cataloging Partners User Guide



WorldCat Cataloging Partners User Guide



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About This Guide

About contains the following topics:

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Overview

2.1 Overview

Scope	The <i>WorldCat Cataloging Partners User Guide</i> presents information about a collaborative relationship with materials vendors that delivers OCLC-MARC records to match the materials ordered through participating vendor partners and sets library holdings automatically in WorldCat. The <i>Guide</i> provides an overview of the service, procedures for using the service, and descriptions of how the service processes records.
Audience for this Guide	The <i>WorldCat Cataloging Partners User Guide</i> assumes a general knowledge of OCLC Cataloging services. The <i>Guide</i> can be used as an introduction to WorldCat Cataloging Partners (WCP), as an instruction manual for using WCP, and as a reference tool to answer questions about WCP.
Ordering WorldCat Cataloging Partners	You can order WorldCat Cataloging Partners through the OCLC Online Service Center. 1">https://www.oclc.org/webapp/wcs/storesservlet/OSCPortal?storeId=1005>1
Availability of this Guide	This <i>Guide</i> is available on the OCLC Web site at < http://www.oclc.org/support/documentation/catalogingpartners/using/guide >
Typographic conventions	In this <i>Guide</i> , italic type indicate values in fields, for example, In the Type field, enter codes <i>a</i> , <i>b</i> , or <i>c</i> . Data you need to supply also appears in italic type in brackets, for example, <i>edx.pcat.[slc]</i> . Do not enter the brackets.
More information	See the following sources for more information about WorldCat Cataloging Partners. The remaining documents are available at the OCLC Web site, at the address given.

Source	Description of Information
<i>OCLC WorldCat Cataloging Partners web site</i> < http://www.oclc.org/catalogingpartners/default.htm >	Information about using WorldCat Cataloging Partners vendor partners, and other information.
<i>Bibliographic Formats and Standards</i> < http://www.oclc.org/bibformats >	Definitions and descriptions of fields and subfields in OCLC-MARC records.
<i>EDX User Guide</i> < http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm >	Requirements and step-by-step procedures for sending files to or retrieving files from various OCLC services.
<i>Product Services Web Reference Card</i> < http://www.oclc.org/support/documentation/batchprocessing/using/productservices/pswrefcard.pdf >	How to use OCLC Product Services via the World Wide Web.

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<i>OCLC-MARC Records</i> < http://www.oclc.org/support/documentation/worldcat/records/subscription/default.htm >	Record and file specifications and lists of valid fields and subfields in OCLC-MARC records.
WorldCat Cataloging Partners Listserv. For information on the listserv, including how to subscribe, see: < https://www3.oclc.org/app/listserv/ >	Ongoing discussion, current information, and support for WCP users. This listserv is owned and maintained by OCLC.

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WorldCat Cataloging Partners

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Introduction

Use this chapter as an introduction or review of the features and functions of the OCLC WorldCat Cataloging Partners service.

1.1 Introduction to WorldCat Cataloging Partners

WorldCat Cataloging Partners WorldCat Cataloging Partners (WCP) is a collaborative effort with materials vendors to reduce the cost of cataloging for libraries. WorldCat Cataloging Partners delivers OCLC-MARC records that match the materials you order through participating vendor partners and sets your library's holdings automatically in WorldCat.

This service includes automated functionality such as adding barcodes and acquisitions data (invoice number, invoice date, price, etc.) to records. It also includes an electronic label file of spine and pocket labels that can be delivered to you or your materials vendor for shelf-ready materials.

Pricing WorldCat Cataloging Partners basic service may be available as part of your OCLC Cataloging Subscription or CatExpress Subscription. Contact your billing partner or distributor for pricing information.

Timing of set holdings Holdings can be set in WorldCat as records are processed or after a delay of 1-180 days. You may use the delay to allow selectors time to evaluate items sent on approval or to allow materials to circulate among your patrons before ILL requests are received. You also have the option of never setting holdings in WorldCat.

Labels for shelf-ready items WorldCat Cataloging Partners can provide customized spine and pocket labels that vendors affix to items so that the items come to you shelf-ready. WCP can also provide spine and pocket label records that you print and affix. Labels are provided at no extra cost.

Shared local catalog options Since WorldCat Cataloging Partners has access to the OCLC WorldCat holdings of all libraries in a shared local catalog, it can provide one record for a joint catalog while setting holdings for individual libraries.

Item check in The WCP Cataloging Report lists all titles that are processed in a vendor manifest and describes the outcome of the processing. You match the items you receive (using the vendor's invoice or packing list) with the titles on the report.

Data retrieval methods WorldCat Cataloging Partners provides bibliographic records for your local system or shared local catalog via one or a combination of the following methods. The method or methods you use depend on local needs.

Method	Availability
OCLC Electronic Data Exchange (EDX) account	Via the Internet using an EDX account
OCLC Product Services Web	Via the Internet

Authority records Authority records are not available through WorldCat Cataloging Partners.

Current approval plans and firm orders With minor adjustments, you can use current approval plans. Some libraries use WCP implementation planning as an opportunity to examine current plans. Your current firm-order methods can remain the same. WCP works well with vendor electronic ordering systems.

1.2 WCP and Other OCLC Products and Services

Introduction	Use WorldCat Cataloging Partners in conjunction with other OCLC products to enhance your cataloging efficiency. For more information, see the OCLC Web site at < http://www.oclc.org/catalogingpartners/default.htm >
OCLC Bibliographic Record Notification	This service supplies upgraded and updated records automatically. Use it with WCP so that you can accept less-than-full-level records. Upgraded records are provided automatically when they become available. If you delay setting holdings in WorldCat with WorldCat Cataloging Partners, the system checks for upgraded records at the point when WorldCat Cataloging Partners delivers records, which can be in advance of when your holdings are added to WorldCat. For details, see the Bibliographic Record Notification Web site at < http://www.oclc.org/bibnote/default.htm >.
OCLC Contract Cataloging	You can receive 100 percent of your cataloging, at a lower cost than you might expect, through Contract Cataloging. Use it to catalog titles processed through WorldCat Cataloging Partners that do not retrieve a matching record, titles you purchase from vendors that do not participate in WorldCat Cataloging Partners, for a growing backlog, or for a gift collection. For details, see the Contract Cataloging Web site at < http://www.oclc.org/customcataloging/services/contract/default.htm >.
OCLC Connexion	You can retrieve your records via EDX or the Product Services Web site and import them into OCLC Connexion to edit, perform authority work, or create labels.
OCLC Label Program	You or your vendor can use the OCLC Label Program to edit and print WorldCat Cataloging Partners label files. For details, see http://www.oclc.org/label/ .
WorldCat Selection	This service allows selectors of new materials at your library to view notification records from multiple vendors in one central comprehensive system. With WorldCat Selection, you can easily get WorldCat records for newly purchased materials into your integrated library system earlier in the technical services process. Use WorldCat Cataloging Partners to provide updated cataloging records, including invoicing information that supports shelf-ready processes, as materials are delivered to your institution or to set holdings in WorldCat once a purchase has been made.
CIP Upgrade Program	<p>OCLC, in cooperation with WCP vendors, upgrades Cataloging in Publication (CIP) records in WorldCat so that WCP delivers more full-level records to you.</p> <p>The CIP Upgrade Program updates CIP records in WorldCat as quickly as possible. Material vendors upgrade their CIP records and send them to OCLC to upgrade the WorldCat records. Visit http://www.oclc.org/us/en/worldcat/catalog/quality/cip/default.htm for more information about the CIP Upgrade Program.</p>
Vendor Record Contribution Program	OCLC pursues relationships with vendors of library materials and bibliographic records for the contribution of bibliographic records to WorldCat. In particular, OCLC strives to enrich WorldCat with records for materials published outside the U.S. and for audiovisual and electronic materials. Consequently, these records are available to WCP libraries. Visit http://www.oclc.org/us/en/partnerships/material/contribution/default.htm for more information about the Vendor Record Contribution Program.

1.3 Ordering WorldCat Cataloging Partners

How to order You can order WorldCat Cataloging Partners through the OCLC Online Service Center.

< <https://www.oclc.org/webapp/wcs/storesservlet/OSCPortal?storeId=1005>>1

Who sets up your profile Those involved in setting up your WorldCat Cataloging Partners profile may include:

- Institution staff
- OCLC staff
- Materials vendors
- Local system vendors

Online service center If you already have an Online Service Center account, use it to order WorldCat Cataloging Partners. If you do not have an account, you can create one.

PDF order form A PDF order form is available for libraries that cannot complete the order form in the Online Service Center.

The PDF form is here: <https://www.oclc.org/catalogingpartners/ordering/ordering/default.htm>

Activating your profile When your WorldCat Cataloging Partners profile is activated, you will be notified along with your material vendor and OCLC staff.

Order method	When profile is activated
Online service center	Upon submitting order
PDF	Within ten business days of receipt of completed PDF

1.4 Shared Local Catalog Options

Introduction	This section describes the options available to libraries that are members of a shared local catalog and that want to be treated as members of a shared local catalog.
Shared local catalog	Shared local catalogs are local systems that are shared by more than one institution with separate OCLC symbols. One OCLC symbol with separate holding library codes, used in the 049 field, is not considered a shared local catalog.
Profile as a member of a group	To profile as a member of a group, fill out the shared local catalog section of the order form. Check the list of shared local catalog groups on the order form before creating a new group.
Benefit of using shared local catalog options	The primary benefit of using the shared local catalog option is that you will receive only one record for your shared local system, with holdings set for your institution on the WorldCat record.
Shared local catalog options	<p>The following options are available to libraries that are members of a shared local catalog:</p> <ul style="list-style-type: none">• You can choose to not receive records if holdings are already set for any institution in your shared local catalog. You can also choose to receive a Partnering Data Record (PDR) with or without the OCLC control number.• Even if your institution chooses not to receive bib records (because another partner library already has holdings set or because your holdings were previously set) you can choose to receive spine and pocket labels.
Ordering shared local catalog options	Each library in a shared local catalog must fill out a separate profile.

1.5 Record Selection

Automated processing

The following is a summary of how WCP processes data for the basic service:

	Action
1	OCLC and vendors establish record format standards, technical requirements, and processing schedules.
2	The vendor sends WCP a vendor manifest that contains bibliographic data about the titles ordered.
3	WCP uses OCN, ISBN, UPC, or Publisher Number (from the 028 field) from the vendor's bibliographic data to determine the matching WorldCat records. Potential matches are validated by comparing the record format. If more than one WorldCat record with different cataloging sources is matched, WCP records all matches. If there are no matches, WCP uses OCLC's Duplication Detection and Resolution (DDR) program to try to find a match.
4	WCP creates the Vendor Inventory Database (VID) that links the Vendor control number and the OCLC control number of the WorldCat record. Future manifests check the VID before matching to see if a match was made in the past.
5	If more than one record was matched, WCP follows a hierarchy of sources to determine which record to deliver. For most libraries, including those new to WCP, records with a source of DLC are chosen first. If there are no matches, WCP reports the Vendor control number and title on your Cataloging Report and creates a Partnering Data Record (PDR), if you are so profiled.
6	WCP compares the WorldCat record with your selection rules and checks whether your holdings are already set. The holdings check avoids duplicate records. For libraries in shared local catalogs, WCP also checks holdings set for other members of your shared catalog. If the record does not satisfy your selection rules or holdings are already set, WCP reports the Vendor control number and title on your WCP Cataloging Report and/or creates a PDR (if you are so profiled). Alternatively, you may choose to receive a record even though your holdings (or those of a member of your shared local catalog) are already set in order to get the latest version of the OCLC master record.
7	If the record satisfies your rules, WCP adds data to your records and: <ul style="list-style-type: none"> • Adds the record to the file of records it provides to you • Creates a label record (if you are profiled for labels) and adds the record to the file of label records it provides to your vendor or to you • Sets holdings immediately or sets holdings after the delay you choose • Creates an archive record • Adds the requisite information to your WCP Cataloging Report

- Record selection rules**
- Encoding level
 - Cataloging source

Encoding level rule WCP determines whether the record meets your Encoding level selection rule based on your choice of Encoding levels in the table below.

1.5 Record Selection (continued)

Encoding level
All
CIP (8)
FULL (Blank, 1, I, L, 4)
Not FULL (7, 5, 2, K, M)
Other (3, E)

Cataloging source rule WCP determines whether the record meets your Cataloging source selection rule based on whether one of the following elements is in Srce (Source), field 040, or field 042 (Authentication code):

Your selection rule	Definition
All	All of the following
LC	LC copy cataloging, PCC libraries, minimal-level upgrades and member-input based on LC
NLM	040 ꞑa contains NLM
UKM	040 ꞑa contains UKM
Other	All valid codes in Srce 040 or 042 that do not fall under the above definitions of DLC, NLM, or UKM

No record delivered or no record found In addition to listing titles for which you receive a record, the WCP Cataloging Report also lists items for which no record was delivered and/or no matching WorldCat record was found. The table below gives some common examples of such situations.

Item Listed as	Because
Record found, but not delivered	Item matches a WorldCat record but does not meet your selection rules
Record found, not delivered	Holdings already set
No record found	No WorldCat record matches the item

Report mismatches If you find a mismatch (a record that does **not** match the item), use the following procedure:

	Action
1	If the holding on the record is delayed, go to step 4. If the holding is set immediately, log on to OCLC Cataloging and find the mismatched bibliographic record in WorldCat.
2	Delete your holdings using the Delete holdings command.
3	Find the correct record in WorldCat and set your holdings using Update.

1.5 Record Selection (continued)

	Action
4	Report the mismatch to OCLC by filling out the Mismatch/No Match report on the Web: https://www3.oclc.org/app/pcmismatch/ .
5	If correcting a record set for holdings delay, you must wait until your holdings appear before you can delete holdings. If you are using Connexion client, you can delete your holdings in batch.

Note: The Delete holdings command is a credit.

Partnering data record WCP can produce a Partnering Data Record (PDR) to carry vendor data when a full record is not delivered or not found. A PDR can also be delivered in place of a record when another institution in your shared local catalog has already received the record. The PDR can include the OCLC number when the record is matched but not delivered.

The PDR contains an 019 field if one is present in the master record. The 019 field allows you to match existing records in your local system that have been merged into other records in WorldCat.

The table below lists the data in the PDR by field.

Field	Data
001 Byte 0-2	pct
001 Bytes 3-10	PDR entry number
019	019 of master record, if any
020	ISBN from vendor manifest
035	OCLC number (when available)
245	Title from vendor manifest
Local fields	All vendor-provided data and notes, as profiled

1.6 Data Added to Records

Introduction

After record selection, data is added to the record. The materials vendor provides the data to WCP in the vendor manifest. WCP supplies other data based on the WCP profile. Using the WCP Order form, the following parties define the data to be added to records:

- OCLC has defined many types of data that can be added to your records
- Your materials vendor has defined types of local data that can be sent to WCP to be added to your records
- Your local-system vendor has created load tables that define the types of local data needed in your records and where the data should appear
- You decide what data to add to your records

Data in records accepted by local systems

All WCP processed records, regardless of delivery method, contain data that differs from other OCLC-MARC records. Your local system must accept the following data in the following fields:

Data	Contents
001 Byte 0–2	Partnering Data Records only. Contains pct . Identifies that the number following is a Partnering Data Record number.
001 Bytes 3–10	Partnering Data Records only. Contains Partnering Data Record number: a PDR entry number.
Local fields	You, each materials vendor, and your local system vendor define local fields and the data in them.

Vendor-provided data

WCP defines data elements that vendors can send in manifests in coded form. WCP adds this data to fields of your records based on your WCP profile. The following are types of vendor-provided data that WCP can add to records:

- Invoice data (invoice date, net price, list price, invoice number, etc.)
- Bibliographic data (notes, etc.)
- Processing data (barcode, location, etc.)

Limits on vendor-provided data

Consult your vendors to determine what each provides.

User-defined data

You determine what data WCP adds to your records. WCP can:

- Add holding library code
- Copy the call number to a local field
- Add data strings

Notes

Notes are subfields that you would like to have added to records. The most common data string adds a local note that indicates the record came from WCP. Another common practice is to use data strings to add codes that are required by your local system. Location codes are also added as data strings. You define the data strings.

1.7 Dewey Options

Introduction	This section describes the Dewey® options available to libraries.
Dewey class length	<p>The list below contains the Dewey options that determine how much of the Dewey classification number you use for your local call number.</p> <ul style="list-style-type: none">• First three numbers (up to the decimal point)• Up to the first slash (prime)• Use entire Dewey class number• Choose the number of characters past the decimal point
Dewey cutter type	<p>The list below contains the Dewey options that determine which Dewey cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first significant word of the main entry. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.</p> <ul style="list-style-type: none">• Cutter Four-Figure number• Cutter-Sanborn Four-Figure number• Text cutter (Options below)• No cutter
Dewey text cutter	<p>The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first word of the main entry. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.</p> <p>You can profile to include punctuation or not include punctuation in your text cutter. You can also choose the case of the text cutter:</p> <ul style="list-style-type: none">• All uppercase• All lowercase• First letter uppercase, rest lowercase <p>WCP can also use numerals or spell out the numerals into an English word (e.g, 2 or Two).</p>
Dewey workmark	<p>WCP can add a title workmark to your Dewey call number. The first letter of the title in field 245 is added to the call number at the end of the cutter. WCP can provide the workmark as it appears in the record (usually uppercase), always in uppercase, or always in lowercase.</p>
Biography Type codes	<p>The list below contains the Type codes that determine whether an item is coded as a biography.</p> <p>Type: <i>a</i>, Biog: <i>a</i>, <i>b</i>, or <i>c</i></p> <p>or</p>

1.7 Dewey Options (continued)

Type: *i*, LTxt: *a*, or *b*

Biography call number text WCP can provide a Biography call number instead of a Dewey classification number for titles that are coded as biographies. For example, a Biography call number may be: 092 Bio Ꞥb Lincoln. You must supply the text for the 092 Ꞥa in your profile.

Biography cutter type The list below contains the Dewey options that determine which biography cutter type you use for your local call number. The biography text cutter is 1-15 characters of the first word of the first 600 field. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

Biography text cutter The biography text cutter is the first 1-15 characters of the first word of the first 600 field. You can profile to include punctuation or not include punctuation in your text cutter. You can also choose the case of the text cutter:

- All uppercase
- All lowercase
- First letter uppercase, rest lowercase

WCP can also use numerals or spell out the numerals into an English word (e.g, 2 or Two).

Fiction Type codes The list below contains the Type codes that determine whether an item is coded as fiction.

Type: *a*, LitF: *l*, *f*, or *j*

or

Type: *i*, LTxt: *f*

Fiction call number text WCP can provide a Fiction call number instead of a Dewey classification number for titles that are coded as fiction. For example, a Fiction call number may be: 092 Fic Ꞥb Wilder. You must supply the text for the 092 Ꞥa in your profile.

Fiction cutter type The list below contains the Dewey options that determine which Fiction cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first significant word of the main entry. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number

1.7 Dewey Options (continued)

- Text cutter (Options below)
- No cutter

Fiction text cutter

The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first word of the main entry. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.

You can profile to include punctuation or not include punctuation in your text cutter. You can also choose the case of the text cutter:

- All uppercase
- All lowercase
- First letter uppercase, rest lowercase

WCP can also use numerals or spell out the numerals into an English word (e.g, 2 or Two).

Juvenile codes

The list below shows how WCP defines juvenile materials.

- If fixed field Audn contains values *a, b, c, d, or j*
- If another code appears in field Audn, but field 082 contains *[E]*
- If any 6xx field has a second indicator 1 or a subfield $\ddagger v$ containing *Juvenile literature*

Juvenile prefix for non-fiction

For titles that are non-fiction, and are coded as juvenile, WCP can add a prefix to the call numbers. You can choose the prefix. The most common are *j, Juv,* and *YA*.

Juvenile fiction call number text

WCP can provide a juvenile fiction call number instead of a Dewey classification number for titles that are ordered as juvenile. For example, a juvenile fiction call number may be: 092 Juv $\ddagger b$ Wilder. You must supply the text for the 092 $\ddagger a$ in your profile.

E in place of Juvenile fiction text

If the 082 field in the matching MARC record contains *E*, WCP can place an *E* in the 092 field instead of the juvenile fiction text for titles that are coded as Juvenile fiction. For example: 092 E $\ddagger b$ Avery

Juvenile fiction cutter type

The list below contains the Dewey options that determine which juvenile fiction cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first significant word of the main entry. The OCLC label formats support up to 8 characters per line, but you can choose more than 8.

- Cutter Four-Figure number
- Cutter-Sanborn Four-Figure number
- Text cutter (Options below)
- No cutter

1.7 Dewey Options (continued)

Juvenile fiction text cutter

The list below contains the Dewey options that determine which text cutter type you use for your local call number. The text cutter is the first 1-15 characters of the first word of the main entry.

You can profile to include punctuation or not include punctuation in your text cutter. You can also choose the case of the text cutter:

- All uppercase
- All lowercase
- First letter uppercase, rest lowercase

WCP can also use numerals or spell out the numerals into an English word (e.g, 2 or Two).

1.8 Label Production

Introduction WCP can create a label record for each item sent by the vendor. WCP posts a file of label records to an EDX account or at the Product Services Web site. You or your vendor retrieve the file of label records and print them using the OCLC Label Program; then affix labels to items. You can also produce labels locally if you import MARC records into the Connexion client.

Label content You define the label content, which consists of:

- Location
- Call number format
- Arrangement of data for labels

Labels and prefixes If you are profiled to have a prefix (such as *J*, *YA*, or *Juv*) added to the call number in the record, the prefix will also appear on your spine and pocket labels as Location Text.

Methods of label record file retrieval WCP makes the label record file available to libraries via an EDX account and on the Product Services Web site.

Label printing Use the Cataloging Label Program (<http://www.oclc.org/label/>) to print labels efficiently. This program is available from OCLC at no charge. Most commercially available label printing programs can also print WCP labels.

Label format Label records in the label file can print in the following formats:

Spine Label 6 (sl6). 1 spine label and 2, 6-line pocket labels.
Spine Label 4 (sl4). 1 spine label and 2, 4-line pocket labels.
Spine Label B (slb). 1 spine label and 1, 4-line pocket label.

These label formats also can be imported into the Cataloging Label Program.

Pocket label title truncation For pocket labels, the printed line limit for the title is 2 lines of 28-characters each. To ensure this limit and to ensure no blank lines appear on the pocket label, WCP uses the following process to determine where to split the title into 2 lines:

	Action
1	Fills up to 28 spaces available for the first line with the title, including characters and spaces between words.
2	Moves back to the first space it finds and breaks the title.
3	If no space is found, moves back to within 4 characters of the beginning of the title and breaks the title.

Spine label character limit For spine labels, each line has a maximum of 8 characters. If, after formatting the call number, a line exceeds 8 characters, WCP places the extra data on the next line.

Label records not created WCP may provide a bibliographic record, but produce a placeholder label record when:

1.8 Label Production (continued)

The bibliographic record has no call number.

The bibliographic record also has an alternative call number; that is, multiple subfields ‡a in field 050, 060, 090, or 096.

Adding vendor-provided or user-defined data makes the call number exceed its printing line limit. The printing line limit for Spine Label 6 (sl6) is 15. The printing line limit for Spine Label 4 (sl4) and Spine Label B (slb) is 9.

- Match labels to items** WCP places label records into the label file in the same order as the titles appear on vendor manifests. If WCP cannot create a label record, a placeholder label record with the text *No Label* is created. After printing a file of label records, you or the vendor attach the printed labels.
- Multiple labels** You can edit and print multiple copies of labels using the Cataloging Label Program or Connexion client. Some vendors can supply multiple label records as needed.
- Vendor labels** Some materials vendors can use the WCP label file to create labels and affix them to materials before sending them to you. If you are interested in this option, contact your materials vendor.

1. WorldCat Cataloging Partners (continued)

Using the WCP Cataloging Report and WCP Statistics

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Introduction

Use this chapter to learn how to use the WorldCat Cataloging Partners Cataloging Report and statistics to manage your WCP account.

2.1 Overview of the WCP Cataloging Report

Introduction You can check items on the WorldCat Cataloging Partners Cataloging Report against invoices and packing lists from vendors. The report provides statistics, lists all titles, and describes how titles are treated by WCP.

Access You retrieve the WCP Cataloging Report from your EDX account and/or the Product Services Web site.

Posting frequency WCP posts the report when it produces a file of records. WCP can produce and post records as frequently as every day.

WCP Cataloging Report The WCP Cataloging Report has the following parts:

Part	Description
Grand summary	Compiles information for all the invoices in the report. Lists the number of invoices, total titles sent, and so forth.
Invoice summary	For each invoice listed in the Grand summary, the report has an Invoice summary. It includes summary data as in the Grand summary, but specific to one invoice. Each Invoice summary also has the following sections: <ul style="list-style-type: none">• Records Matched, Records Delivered. A title list of records matched and sent. It includes characteristics of the record, for example, vendor control number, call number, cataloging source, encoding level, series indicator, and label production indicator.• Records Matched, No Records Delivered. A title list of items for which a record matched but for which no bibliographic record was delivered. It includes why the record was not delivered and any vendor-provided data for the item from the vendor manifest.• No OCLC Record Found. A title list of items for which no record was found. It includes vendor-provided data for the item from the vendor manifest.• Shared Local Catalog, Records Not Delivered. A title list of items for which a record matched, but for which no bibliographic record was sent because the record already had holdings set for another member of the shared local catalog. It includes vendor-provided data for the item from the vendor manifest.

Type of software to use with the report The WCP Cataloging Report is an ASCII file that you can use with word processing software, for example, Microsoft Word® or Corel WordPerfect®.

Sort order The WCP Cataloging Report is sorted alphabetically by title under each invoice.

2.2 Description of the WCP Cataloging Report

The following table describes the elements in the **Grand summary**:

Element Name	Description
DATE PROCESSED	The date WCP processed the vendor manifest.
INSTITUTION	The institution name.
VENDOR	The vendor name.
INVOICE NUM	Invoice Number. The vendor assigned invoice number, when supplied by the vendor.
INV DATE	Invoice Date. The date the vendor created the invoice.
ITEMS	Items. The number of titles in the invoice.
TOTAL INVOICES	The number of invoices in the report.
TITLES SENT	The total number of titles from all invoices.
RCDS MATCHED, PROD DELIVERED	Records matched, products delivered. The number of records delivered.
RCDS MATCHED, NO PROD DELIVERED	Records matched, no products delivered. The number of records that matched a WorldCat® record but for which no record was delivered.
SHRD LOC CAT RCDS NOT DELIVERED	Shared local catalog records not delivered. The number of records that matched a WorldCat record, but which were not delivered because another library in the shared local catalog had holdings attached.
NO OCLC RECORD FOUND	The number of items for which no matching WorldCat record was found.
NO SITE ID	The number of titles that did not have a collection ID (usually location or fund code) in the vendor manifest, which means they could not be processed.
DATE HOLDINGS SET	The date on which holdings are set for all the titles in the report.
NUMBER OF ERRORS	The number of items on the vendor manifest that could not be processed.

The following table describes the elements of the **Invoice summary**:

Element Name	Description
DATE PROCESSED	The date WCP processed the vendor manifest.
INSTITUTION	The institution name.
VENDOR	The vendor name.

2.2 Description of the WCP Cataloging Report (continued)

Element Name	Description
VENDOR INVOICE NUMBER	The identifying number assigned by the vendor. (The invoice number on your vendor invoice matches this number.)
TITLES SENT	The number of titles for this invoice.
RCDS MATCHED, RCDS DELIVERED	Records matched, records delivered. The number of records delivered.
RCDS MATCHED, NO RCDS DELIVERED	Records matched, no records delivered. The number of records that matched a WorldCat record but for which no record was delivered.
SHRD LOC CAT RCDS NOT DELIVERED	Shared local catalog records not delivered. The number of records that matched a WorldCat record, but which were not delivered because another library in the shared local catalog had holdings attached.
NO OCLC RECORD FOUND	The number of items for which no matching WorldCat record was found.
NO SITE ID	The number of titles that did not have a collection ID (usually location or fund code) in the vendor manifest, which means they could not be processed.
NUMBER OF ERRORS	The number of items on the vendor manifest that could not be processed.

The table below describes the detailed elements of **Records Matched And Delivered/No Records Delivered/ Shared Local Catalog Records Not Delivered**:

Element Name	Description
TITLE	The title taken from field 245 (Title Statement) subfield Ꞥa of the WorldCat record.
OCLC NUM	OCLC Number. The OCLC control number of the record delivered for the title.
VENDOR CONTROL NUM	Vendor control number. The unique number assigned by the vendor for the title.
CALL NUM	Call number. The Library of Congress, National Library of Medicine, or Dewey® call number (from subfield Ꞥa of the call number field).
SRC	Cataloging source. The agency that created the record. Taken from field 040 (Cataloging Source) subfield Ꞥa of the WorldCat record.
EL	Encoding level. The encoding level of the record. Taken from ELv1 (Encoding Level) in the fixed field of the WorldCat record.

2.2 Description of the WCP Cataloging Report (continued)

Element Name	Description
SER	Series. Y indicates the title is a series. N indicates it is not. Y indicates that the WorldCat record has field 400, 410, 411, 440, or 490 (with indicator value 1).
LBL	Label. Indicates if a label has been generated for this title. Y indicates a label record was generated. If the space is blank, no label was generated.
STATUS	For Records matched, records delivered area, gives additional information when needed. For Records matched, no records delivered area, explains why no record was delivered.

The table below describes the **status messages**:

Status Message	Description
INSTITUTION NOT PROFILED FOR THIS CATALOGING SOURCE	The record matching this title has a cataloging source that your profile indicates you do not wish to receive.
INSTITUTION NOT PROFILED FOR THIS ENCODING LEVEL	The record matching this title has an encoding level that your profile indicates you do not wish to receive.
HOLDINGS ALREADY SET FOR THIS INSTITUTION	Your holding symbol was already attached to the matched record and your profile indicates you do not wish to receive a record.
SHRD LOC CAT RCDS NOT DELIVERED	Shared local catalog records not delivered. The holding symbol of an institution that shares your local catalog was already attached to the matched record and your profile indicates you do not wish to receive a record.
RECORD DELIVERED, BUT THE FOLLOWING FIELDS WERE TRUNCATED	The record had to be truncated. The truncated fields are listed.
DUPLICATE OCLC NUMBER	The matched record was already delivered in this manifest.
Note: Following the Title, Vendor control number, and International Standard Book Number (ISBN) is other vendor-provided data for the title from the vendor manifest.	

The table below describes the elements of **No OCLC Record Found Detail Lines**:

2.2 Description of the WCP Cataloging Report (continued)

Element Name	Description
TITLE	Short title taken from vendor manifest.
VENDOR CONTRL NUM	Vendor control number. The Vendor control number for a title.
ISBN	International Standard Book Number. ISBN taken from vendor manifest.
Note: Following the Title, Vendor control number, and International Standard Book Number (ISBN) is other vendor-provided data for the title from the vendor manifest.	

2.3 Overview of the WCP Statistics

Introduction You can view your statistics for the past 18 months at the WCP Statistics website:
< <http://pcatstats.oclc.org/PCatStatistics/>

Access You can logon to the WCP Statistics website by using your OCLC authorization number as the Account, and your corresponding OCLC password as the Password.

Posting **Frequency:** WCP posts statistics to the Statistics website each day as manifests are processed.

Coverage: Statistics are available from the previous day to 18 months before the previous day.

You are asked to enter a date range for the statistics that you would like to see. Enter the date in yyymmdd format, for example, 20110101

WCP Statistics The WCP statistics has the following columns:

Column	Description
Vendor	The OCLC symbol for your vendor. If you use more than one vendor, the symbols are listed in alphabetical order.
Vendor ID	Your account number with this vendor. Corresponds to your WCP profile account number.
Date	Date the manifest was processed.
Titles	Total number of titles sent in the manifest.
Rcds Dlvrd	Number of records delivered.
Pct Dlvrd	Percent of total records delivered.
Pct Match	Percent of total records matched.
CIP Dlvrd	Number of CIP records delivered.
Pct CIP	Percent of total records delivered that were CIP records.
Labels	Number of labels delivered.
PDRs Dlvrd	Percent of total records delivered that were PDRs.

Invoice level To see statistics for specific invoices, click on the date of the invoice.

2. Using the WCP Cataloging Report and WCP Statistics

Retrieving Data

This chapter contains the following topics:

Subject	Page
3.1 Overview of Data Retrieval	3:2
3.2 Using Connexion with WCP Records	3:4

Introduction

Use this chapter if you retrieve bibliographic records, label records, and the WorldCat Cataloging Partners (WCP) Cataloging Report via

- Standard File Transfer Protocol (FTP) from an EDX account
- Product Services Web

3.1 Overview of Data Retrieval

Introduction	The OCLC WorldCat Cataloging Partners service (WCP) provides two methods for Internet data retrieval: your EDX account (which uses standard FTP) and the Product Services Web site.
Product Services Web	For information on using the Product Services Web, see the <i>Product Services Web Quick Reference</i> at < http://www.oclc.org/support/documentation/batchprocessing/using/productservices/default.htm >.
EDX account	<p>An EDX account allows you to retrieve the following files and reports:</p> <ul style="list-style-type: none">• Bibliographic record files• Label record files• WCP Cataloging Report <p>If you choose EDX as a delivery method when ordering WorldCat Cataloging Partners (WCP), you are automatically given an EDX account.</p>
Combining methods	You can use one or a combination of methods to retrieve bibliographic record files, label record files, and your WCP Cataloging Report. For example, you may retrieve bibliographic records from your EDX account and your WCP Cataloging Report from Product Services Web.
Posting frequency	WorldCat Cataloging Partners can produce and post record and label files and reports as frequently as every day.
Posting notification	You can request that WorldCat Cataloging Partners notify you by e-mail when it posts files to your account.
File availability	<p>You can retrieve files any time of day except for the following:</p> <p>Monday through Saturday, 2:00 am to 3:00 am U.S. Eastern Time</p> <p>Sunday 2:00 am to 6:00 am U.S. Eastern Time</p>
File longevity after posting	Bibliographic record files, label record files, and WCP Cataloging Reports remain posted for 90 days. Label files and Cataloging Reports are only archived for one year (files older than one year are not retrievable). Bibliographic record files are archived and retrievable through the Bibliographic Record Snapshot service. For more information, contact your OCLC regional service provider at < http://www.oclc.org/contacts/regional/ >.
Vendor-label file availability	Vendor label record files are available only from the vendor's EDX account so the vendor can affix labels to your items. Vendors cannot access your EDX account to retrieve labels. Vendors have no access to your WCP records or reports.
Summary of WCP data retrieval methods	The table below describes the WCP data retrieval methods. Due to the size of record and label files, standard FTP is usually the most efficient retrieval method. For information on using the EDX service, see the <i>EDX User Guide</i> at: http://www.oclc.org/support/documentation/worldcat/records/edxuserguide/default.htm .

3.1 Overview of Data Retrieval (continued)

Data Retrieval Method	Access Method	Authorization and Password	Retrievable Data
EDX	Standard FTP	EDX	<ul style="list-style-type: none">• WCP Cataloging Report• Label record files• Bibliographic record files• PDRs
Product Services Web	Web access only	Any OCLC authorization and password	<ul style="list-style-type: none">• WCP Cataloging Report• Label record files• Bibliographic record files• PDRs

3.2 Using Connexion with WCP Records

You can use OCLC Connexion browser or OCLC Connexion client to display and edit your WCP records before loading them into your local system. To use Connexion you must retrieve the WCP records via EDX or the Product Services Web, then import the records into Connexion.

Record location

- Connexion browser puts your imported records in the online save file. You can search for imported records by searching for a Status value of *Imported*, or by the My Status notes that you indicated on the import page.
- Connexion client lets you choose whether the imported records go in the online save file or the offline local file.

Actions you can take

You can take most actions on your imported WCP records, including:

- Display Holdings
- Derive New Record
- Apply Constant Data
- Insert My Status notes
- Validate
- Update Holdings
- Export

When you attempt to Lock a Master Record the system warns you that your changes will be lost and asks whether you want to continue.

Delete holdings

Holdings cannot be deleted using Connexion Browser.

When records are first imported into Connexion Client, holdings data is not included so holdings cannot be deleted. Use the validate command to update the holdings data, then holdings can be deleted.

More information

For more information on importing records with OCLC Connexion, see Connexion system Help or documentation.

- Connexion browser documentation: <http://www.oclc.org/support/documentation/connexion/browser/>
- Connexion client documentation: <http://www.oclc.org/support/documentation/connexion/client/>