OCLC Member Merge Program

Presentation summary

Laura Ramsey from OCLC gave a presentation on the OCLC Member Merge Program providing a brief history of the project and some of its successes. The program began in 2013 with a pilot of 4 institutions while cohort 2 started up in 2017, with an additional cohort added each year since. The training process has been improved and streamlined over the past several years with improvements to documentation, new recorded demonstrations, and access to the OCLC Member Merge Community Center. To date there are 45 institutions participating in the program with training done in 6 different formats. Since the beginning of the program, our members have performed over 55,000 merge transactions. To join the program an institution must be a member of the Program for Cooperative Cataloging and can express their interest by sending an email to ASKQC@oclc.org. A new cohort is being planned to start in the fall.

Andrea Morrison from Indiana University, Bloomington gave a presentation on their experience with the Member Merge Program. IU joined the program in September 2018. Merge program training follows a train the trainer approach which they kept in mind when they identified the participants. All trainees were NACO catalogers and came from the Herman B Wells and Cook Music Libraries. The institution attended several webinars and reviewed resources on the Community Center. The participants individually reviewed records and added their comments to a shared document. After gaining independence in merging, they discussed how they would incorporate merging into their daily activities. They focus on merging records of which they have resources available that they are cataloging. They plan on continuing to train catalogers at both libraries and are interested in expanding their training to other formats. Indiana University highly recommends the program which supports their objective of providing access to their users and serves the global cataloging community.

Marcus Jun of the Washington Research Library Consortium gave a presentation on the group's experience with the Member Merge Program. The WRLC group is made up of American University, George Mason University, Georgetown University, and George Washington University. There were 17 catalogers in total involved in the training. The training was very practical with real world examples. The documentation was very clear and detailed and was particularly helpful with the field-by-field explanations. During the review process they used a shared Google document which was beneficial as they were able to learn from other catalogers and the feedback from their review. The process of merging duplicate records is very empowering and satisfying to be able to get rid of duplicates. It can become a part of your copy cataloging workflow when you take that extra step in merging duplicate records after you have cataloged a resource.

Member Questions

Question: Is this only for language of cataloging records in English?

Answer: No it's not. Comparison between records regardless of language of cataloging does not differ. Our member merge participants are welcome to merge records in any language of cataloging.

Question: Has anyone volunteered to look at merging cartographic material records?

Answer We have two institutions that are merging map duplicates.

Question: Are National-level records excluded from this program?

Answer: No they are not, and part of the reason that we require PCC status to participate in the program is that you will be working with PCC records.

Question: When it comes to older materials, how do you make sure you do not merge records that may refer to a different resource?

Answer: Merging records for older books does require more care. Documentation for merging rare materials has recently been written and we have set the expectation that only rare book catalogers will be merging rare book duplicates.

Question: Is there an expectation that an institution do a certain number of merges per month or year once trained?

Answer: We had discussed putting a minimum number in place at one time, but that did not happen. Any merges that are done is a benefit, whether it's 1 a month or 100 a month.

Question: Is any of this work done in batch mode - or are records looked at 1 at a time?

Answer: Records must be reviewed one record at a time.

Question: Can NACO only libraries participate or do you have to be a part of BIBCO?

Answer: Yes, NACO only libraries can participate since they meet PCC status.

Question: Is there any training out there on how not to get your Special Collection records merged?

Answer: The "Cataloging Defensively" presentations are not cataloging workshops, per se, but are designed to give some background to how OCLC's Duplicate Detection and Resolution (DDR) software deals with bibliographic records, both generally and for the specific bibliographic format in the title. They should help catalogers use MARC 21 and the instructions in both RDA and AACR2 to the best advantage in making sure that DDR performs appropriately when encountering a record that is legitimately unique according to the descriptive conventions.

Question: How do you avoid the problem referred to in the Chat regarding erroneous merging, particularly of older book records?

Answer: See answer directly above.

Question: If there are holdings attached to the brief record to be merged, who notifies those holders their record has "changed"?

Answer: Institutions can set up to receive notifications for certain changes to bibliographic records through WorldShare Collection Manager's WorldCat updates service.

Question: Are there ways to "un-merge" records?

Answer: Yes, if the merge occurred in 2012 or later.

Question: So when records are reported using the "report error" option in the Connexion Client, do they enter a queue that may be reviewed by the member merge program?

Answer: It's possible, if a participating institution has requested that we supply them with requests to work from.

Question: Is there a risk of merging and eliminating records that are cataloged in different ways, as works in parts?

Answer: Records for the whole part vs. records for individual parts would not be merged.

Question: How does training take place?

Answer: The training consists of 2-3 training webinars with Metadata Quality staff, generally spaced out every few weeks.

Question: In merging HathiTrust records, do you leave both 856 fields if the OCLC embedded number is different?

Answer: If the links are valid and take you to different digitized versions of the resource, then the 856 fields should remain on the bibliographic record.

Question: Also is there a way to report records to merge, beyond Report Error?

Answer: There are a variety of ways to report duplicate records. See "Reporting methods available" in Bibliographic Formats and Standards.

Question: Could Andrea and/or Marcus speak to how they incorporated this work into existing workflows?

Marcus' answer: Currently I mostly copy catalog ebooks in Connexion. For example, some vendors will send us bib records without OCLC numbers. So I'll look up the titles in Connexion and as I come across duplicates I will merge them while I copy catalog ebooks.

Andrea's answer: Yes, at first I asked my catalogers in my unit to report merge issues with print-outs in the physical material. I trained them by reviewing records to merge in regular unit meetings. They delivered the materials to a designated location. They indicated the record they wanted to keep and included printouts of that record and the records they wanted to merge. I encouraged them to keep saved local copies of records to be merged in case they need to add information later during cataloging. Also, when I merged, I transferred information that would not normally merge so it would be retained.   I returned the materials and they completed cataloging. As I mentioned, I had to cut down on merging records for all materials to reduce our time commitment. I merged records daily in the beginning for about 20 minutes every day, extending this later to every few days.

We worked on changing the process over several months by discussing in our unit meetings what materials would have the most impact for us and for other catalogers and users. We reviewed cataloging defensively. I eventually limited merging to the types I mentioned in the panel session. In addition to staff giving me the physical materials, sometimes I met with staff on complicated issues, for example, several multipart records to choose from or many full-level records. Those were also good

cataloging training opportunities and it helped me evaluate which catalogers I would train for the merge program. Depending on the experience of my cataloging staff, I occasionally updated the record during the merge process and returned it to staff to complete cataloging. On rare occasion, I took the material to catalog myself to BIBCO standards. I also answered questions about whether records were appropriate for merging via e-mail.