Welcome
First sessions

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• *Integrating Collection Manager’s WorldCat cataloging partner collections into your GOBI workflow* (Hillen, Burke, Wiljanen)
• *Incorporating subject headings for Indigenous peoples of North America/First Nations* (Allison-Cassin, Tarango)
• Questions/Trivia contest
• Short break
Today’s Schedule

First sessions

• Welcome
• *Integrating Collection Manager’s WorldCat cataloging partner collections into your GOBI workflow* (Hillen, Burke, Wiljanen)
• *Incorporating subject headings for Indigenous peoples of North America/First Nations* (Allison-Cassin, Tarango)
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Final sessions

• *Using Connexion macros to automate workflows* (Mullin) | *Connexion update* (Whitehair)
• Questions/Trivia contest
• *OCLC and Linked Data* (Chapman)
• *OCLC Cataloging Update*
  • Cataloging news (Quality Control team)
  • Questions for OCLC
• Closing
Housekeeping

WebEx

• If your computer audio is not working, please dial in by phone
  • Dial-information has been posted in Chat

• To submit questions, use Chat and send to “Everyone”
  • Note: Your question will be visible to everyone attending this session

• Trivia questions will be done via WebEx polling
Housekeeping

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Post-event

• OCLC will make available:
  • Recordings of each session
  • Slides
  • Notes taken by OCLC staff
• Notifications:
  • Registrants will receive an email from WebEx
  • Messages will be sent to selected listservs
  • OCLC will post links to content:
    • Cataloging & Metadata, Record Manager and Collection Manager communities
    • AskQC help site
New Community

• Debuted in late 2020
• Open to libraries with an OCLC cataloging subscription
• All cataloging topics welcome
• Complements existing communities

https://www.oclc.org/community/cataloging-metadata.en.html
Session: Integrating Collection Manager’s WorldCat cataloging partner collections into your GOBI workflow
Jody Stroh
Product Manager, Metadata Services

Introduction
Charles Hillen
GOBI Library Solutions

Shannon Burke
Texas A&M University Libraries

Kim Wiljanen
Michigan State University
WorldCat Cataloging Partners via GOBI

Charles Hillen, Director of Library Technical Services
GOBI Library Solutions from EBSCO
January 15, 2021
Service Overview

• Available since 1996
• 300+ customers
• 295,000+ titles transmitted in FY20
• Initial steps
  • GOBI Library Solutions drafts a technical specifications document
  • Library creates WCP profile
  • GOBI Library Solutions maps WCP collections to GOBI subaccounts
• GOBI Library Solutions
  • Transmits title and order information to OCLC for spine label data
  • Transmits title and order information to OCLC for record output
• OCLC
  • Matches title information to records in WorldCat and selects an appropriate record
  • Inserts GOBI order information
  • Delivers spine label data
  • Sets holdings in WorldCat
  • Delivers records
Workflow Overview

• Customer places an order either in GOBI or by transmitting an e-order from their ILS or GOBI assigns an item to the customer based on their approval profile.
• When the item is picked from stock, GOBI transmits title and order information to OCLC.
• OCLC matches title information to records in WorldCat, selects an appropriate record, then delivers spine label data to GOBI Library Solutions.
• GOBI prints the spine label data as transmitted in the file.
• The item is physically processed according to the tech spec details, invoiced, and shipped.
• GOBI transmits a manifest of title and order information to OCLC.
• OCLC matches title information to records in WorldCat and selects an appropriate record. Then:
  • Inserts GOBI order information, including the spine label data previously transmitted to GOBI
  • Sets holdings in WorldCat in the timeframe specified by the customer
  • Prepares a record file for delivery to the customer
• The customer retrieves the MARC record file from WorldShare Collection Manager.
Technical Specifications at GOBI

Technical Specification (a.k.a. tech spec or spec) is defined as:

An outline of service choices and key parameters that are used to configure services, bibliographic record field mapping, billing, and to aid in problem solving.
Why is this GOBI’s preferred first step?

- To ensure the success of WCP service, the decision to create one Collection or many Collections, within one profile or across multiple profiles, is based on multiple factors and requires consultation with GOBI. Technical Specifications reflect the options that are assigned after that consultation.

- It is vital to familiarize yourself with the impact of the ordering process on the available options before starting work on the WCP profile.
Tech Spec (cont’d)

The detail in the tech spec outlines the configuration of the WCP profile and determines which profiles you need to build.

• The Account value in WorldShare Collection Manager is identified.
  o GOBI offers naming conventions to ensure consistency across collections

• The Collection ID Type is identified.
  o Subaccount
  o Fund Code
  o Location Code
Tech Spec (cont’d)

If Collection ID Type is Subaccount:
• Create a collection for each subaccount number without the dash.
  o For example, subaccount 8466-10 would be Collection ID 846610.

If Collection ID Type is Fund Code:
• Create a collection for each fund code assigned to materials ordered on the subaccounts listed.

If the Collection ID Type is by Location Code:
• Create a collection for each location code assigned to materials ordered on the subaccounts listed.
For Fund Code or Location Code Collections:

- The Collection ID must match the value entered at the time of order.
- To ensure appropriate selections, this will be aided by validation lists in the GOBI order interface or an associated approval plan.
- Multiple subaccounts may have the same Collection ID Type.
Tech Spec (cont’d)

For All Collections:

• GOBI notes whether spine label data will be supplied to GOBI.
  o If label supply/application is required, font and placement details are included in the processing section of the spec.
  o GOBI does not intervene on spine label data, so detail supplied by OCLC is printed *exactly* as received. As such, other than the details described above, GOBI does not describe customer-selected spine label options.
  o You may opt to have OCLC supply spine label data to your institution, but GOBI does not include that detail in the spec.

• Holdings options are not detailed in the spec, but it is important to consider how your selections impact on spine label and record supply.
• You may also want to ask GOBI to configure the service to allow local data (selector’s initials, local notes, location code, etc.) to be keyed into GOBI and passed to OCLC for inclusion in the final MARC records.
Beyond Tech Specs

Although WCP is owned by OCLC, the performance of the service as an efficient and long-lasting workflow solution will depend on how you manage the integration process with GOBI. It is important to spend time thinking about the criteria that guide your purchasing decisions (e.g., funds, locations), the data elements you need to make receiving and cataloging more seamless, and how those choices influence physical processing (e.g., spine label prefixes).
Workflow Management / Questions

• Customers should not make changes to the WCP profile without notifying GOBI. There is no relationship between updates made in the profile and the configurations at GOBI, so it is always best to consult GOBI first.

• OCLC WorldCat is a highly dynamic database that undergoes continual updating. As such:
  • GOBI cannot guarantee that a certain percentage of titles will receive spine labels or records.
  • Infrequently, items will be received without a spine label, but the customer receives a record with a valid call number. On occasion, OCLC will not transmit call numbers to GOBI because the WorldCat record did not exist, didn’t meet customer requirements, or didn’t have a call number before the customer’s file is created.

• Problem solving should always start with GOBI. Since the record and spine label delivery processes start with the GOBI order data transmission, we like to verify that our transmission files and functions have all performed normally before the customer engages their OCLC representative.
Thank you!
Integrating Collection Manager’s collections into our workflow to better manage GOBI print materials

SHANNON BURKE
COORDINATOR OF MONOGRAPH ACQUISITIONS
SBURKE@LIBRARY.TAMU.EDU

OCLC CATALOGING COMMUNITY MEETING
JANUARY 15, 2020
Integration

- User Expectations
- Firm Order or Approval Plan
- Budgets
- Workflows: Bringing it all together efficiently
Overview

❖ Gobi is our main monograph vendor

❖ On average in a year, we receive from GOBI in print
  ❖ Approval → 10,000 - 12,000 books
  ❖ Firm → 1,700 – 2,200 books

❖ Collection Manager is the tool that helps us with the management of our catalog records

❖ Efficiency in workflow for acquisitions to be effective in getting our collections into the hands of our users
Process (Behind the scenes)

TAMU places orders for print book with GOBI

GOBI sends a manifest to Collection Manager

Collection Manager generates the records weekly
Process Continued

Collection Manager generates records for TAMU & spine label, print files for GOBI

GOBI completes physically processing & ships the books

TAMU receives records & books
Considerations & our GOBI Accounts

- Acquisition Methods
- Locations
- Priority
- Format
- Funds

Approval

1. 5657-12 Children's Award Books
   5657-15 Business Library

2. 5657-14 Evans Library
   5657-25 Adult Award Books

Approval

Firm

3. 5657-18 Evans Library
   5657-19 Business Library
   5657-71 Evans Notifies
   5657-72 Business Notifies
   5657-73 Poli Sci Notifies
### Records Delivered Weekly

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<td></td>
<td>12/21/2020</td>
<td>Download</td>
</tr>
</tbody>
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Facilitates Bulk Processes

❖ 900 Fields included in records can be helpful

=945 \$b714017 \rightarrow (GOBI Invoice Number)

=947 \$aA14850730244 \rightarrow (Library Barcode)
Using bulk import of records allows us to automatically create purchase orders.

Bulk load into ILS

Processed: 121
Added: 121
Discarded: 0
Rejected: 0
Errored: 0
Replaced: 0
Merged: 0
Deleted: 0
Mfhds created: 121
Items created: 121

Purchase Order Number: 369272
Number of PO Created: 121
Number of PO Approved: 121
Number of Line Item Processed: 121
Number of Line Item Rejected: 0
Number of Line Item Inserted: 121
Mon Dec 21 09:03:26 2020
Result

➢ At this point, we have the books in hand, the records are in our catalog.

➢ On to Cataloging for review

➢ And ready for the user 😊
Thank you!

SHANNON BURKE
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SBURKE@LIBRARY.TAMU.EDU
WorldShare Collection Manager
Partnerships
Michigan State University

Began as an agricultural land-grant school in 1855

Today, Michigan State is one of the top research institutions in the world

Beaumont Tower
MSU Libraries

Comic Arts Collection
Turfgrass Information Center
Vincent Voice Library
Gast Business Library
Morovsky Library
Hollander Makerspace
Digital Scholarship Lab
Maps Library
Arts and Music
Digital Media

and more…
Shelf-Ready Books

GOBI Library Solutions
and
WorldShare Collection Manager
GOBI Library Solutions

Obtains the books that were ordered
Selects the books for the blanket order plans
Sends the book and pricing information to WorldShare Collection Manager
Receives the labeling information and physically processes the books
Invoices and ships the books weekly
Customizations for GOBI Library Solutions

Profiles and selects books for the blanket order plans
Keeps track of the different plans using sub-accounts
Creates individual invoices for each sub-account
Creates a separate invoice for the physical processing
WorldShare Collection Manager

Receives the information regarding the shipment from GOBI Library Solutions
Selects the records
Returns the labeling information to GOBI Library Solutions
Creates bibliographic record files
Posts the files for download from their website
Customizations for WorldShare Collection Manager

Defined 049 fields in WorldShare Collection Manager automatically update the location field in the firm order records for MSU Libraries.
Customizations for WorldShare Collection Manager

MARC record files hold more than just a bibliographic record
- 935 Field – Contains the purchase order numbers for firm orders
- 980 Field – includes the invoicing information
- 981 Field – includes the vendor code

WorldShare Collection Manager creates three different files for MSU Libraries
MSU Libraries

Downloads the bibliographic records from WorldShare Collection Manager
Imports the files into our ILS
Sorts the books into their proper workflows
Receives the books
Verifies that the publication data in the book matches the record
Problems are sent to catalogers
Customizations for MSU Libraries

Uses two different loaders for importing the files
Runs a series of checks on the records that were loaded
Flags electronic records that may have been received
Flags books that must be handled as rush
Separates the blanket orders records that are received in a single file and updates the vendor code for different sub-accounts
General Types of Problems

No bibliographic records available
Incorrect records due to duplicate ISBNs
eBook records supplied for printed books
Conclusion

Creative partnerships

Enable libraries to expand their capabilities
Fill knowledge gaps
Improve efficiency through cooperation

Partnerships create solutions
Thank you
OCLC Cataloging Community Meeting
15 January 2021