OCLC Cataloging Community Meeting: WorldCat Updates

18 June 2021
Welcome
Today’s Schedule

First sessions

• Welcome
• WorldCat updates
  o Putnam
  o Culbertson
• Diversity, Equity, Inclusion
  o Baxmeyer
  o Brewer, Huang, Schlottmann
  o Lown, Whittenberger
• Short break
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Final sessions

• OCLC product updates
  o Whitehair
• OCLC cataloging updates
  o Metadata quality staff
• Questions for OCLC
• Closing
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 others attending this session
Housekeeping

WebEx

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Post-event

• OCLC will make available:
  o Recordings of each session
  o Slides
  o Notes taken by OCLC staff
• Notifications:
  o Registrants will receive an email via WebEx
  o Messages will be sent to selected listservs
  o OCLC will post links to content:
    • Cataloging & Metadata, Record Manager and Collection Manager communities
    • AskQC help site
Session: WorldCat updates
WorldCat Controlling & Enrichment Updates

Nathan B. Putnam
Director, Metadata Quality
Authorities

- AAT (The Getty Art and Architecture Thesaurus)
- BNE (Biblioteca Nacional de España Spanish)
- Canadiana (Library and Archives Canada)
- GND (German National Library)
- LC (Library of Congress)
- Māori Subject Headings (National Library of New Zealand)
- MeSH (National Library of Medicine)
- NTA Names (Dutch Royal Library)
- RVM (Répertoire de vedettes-matière)
Controlling headings

• Controlling information
  o Cataloger initiated controlling → oc.lc/control-headings
  o Automated controlling service → oc.lc/heading-control-service

• Subject controlling quick stats
  o LCSH/LCGFT – 86% of records
  o MeSH – 52% of records
  o AAT 2.2% of records
  o RVM – 0.7% of records

• How is OCLC going to update these percentages?
Heading enrichment

- Record Manager functionality
  - “Add Equivalent Subject Headings” to a bibliographic record
  - Functionality available since June 2020

The process reviews controlled subject strings in bibliographic records containing RVM, AAT, LCSH, or MeSH and inserts equivalent terms as found in RVM authority records into the bibliographic record for these vocabularies.
Heading enrichment – example

Before enrichment

650 0 $a Chemistry, Physical and theoretical.

After enrichment

650 0 $a Chemistry, Physical and theoretical.
650 2 $a Chemistry, Physical.
650 6 $a Chimie physique et théorique.
650 7 $a physical chemistry. $2 aat

• How is OCLC going to enrich WorldCat to make use of this functionality?
Controlling (and enrichment) retrospective

• Later this year, OCLC will run the controlling software over the WorldCat bibliographic catalog (510+ million bibliographic records)

• This will
  o Control all controllable headings
  o Update headings as applicable
  o Apply the heading enrichment

• Estimated that three-quarters of all WorldCat records will be updated

• Email coming soon on how to take advantage of the added headings through WorldCat updates within Collection Manager
Settings

- Configure settings to enable the appropriate updates

- Fields for enrichment, all 6xx
  - LCSH = second indicator 0
  - MeSH = second indicator 2
  - RVM = second indicator 6
  - AAT = second indicator 7, $2 aat
WorldCat updates: Corrections supplied automatically

Becky Culbertson
Serials Cataloging Librarian
California Digital Library
WorldCat updates:
Corrections supplied automatically

Becky Culbertson
Shared Cataloging Program / California Digital Library
June 18, 2021
What is WorldCat updates?

• A service from OCLC to supply MARC records with corrections/enrichments that are important to YOU

• A service from OCLC to supply MARC records that have been merged

• Updates are based on WorldCat records—you get the latest!

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/WorldCat_updates
Decisions, decisions

- Who decides which criteria are important to include?
  - Group or individual
  - Remember that this is *not* set in stone—can be changed
- How long does it take to set up the update service?
- After setting it up, what would you do differently?
- How often do you want to get updates?
WorldCat updates criteria
What are the criteria you can’t live without?

- Serial date status (PubSt: 008/06) going from “c” to “d”
- Encoding level (going from a lower level, e.g., K, to blank or 7)
- Adding a 042 field for pcc is useful; especially for serials
- Adding a 247 field for changes in integrating resources
- 880 field changes to get records with new original-script fields added. Very useful ever since OCLC began the project to auto-populate original scripts.
What are the criteria that you can live without?

- Monographs—surprisingly, 505 fields as it makes the files too big to deal with. Just something to think about. Other libraries may feel differently.
- Deciding on criteria is very individual. Don’t get carried away.
- Recommend that you NOT use the “Receive updates for any change to the WorldCat master record” (This was shown in the WorldCat Updates criteria slide.)
How much time does it take to process?

• Data loader #1 (all online records)
  o Monos: a few hours done once a month.
  o Serials: variable but usually a few hours a week. More if cessations, or title changes are involved.

• Data loader #2 (all formats)
  o The database maintenance unit does batch work around two days a month and also spends time doing the individual record review
Deliver serials in a separate file
MARC customization – Reason for record output

Customize Records
Customize the information included in your institution’s MARC records. You can also control MARC options for an individual collection at the collection.

* Required field

All Collections
Holding Library Code (049 $a)

Delete Fields
Tag 010 Ind 1 Any Ind 2 Any

Delete Subfields
Tag 599 Ind 1 Any Ind 2 Any Subfield a

Add Fields
Tag 999 Ind 1 Blank Ind 2 Blank
Subfield a
Value Reason for Record Output
Auto-overlay or individual review?

Dataloader #1:

• Monos are always completely automatically overlaid.

• Serials are not overlaid automatically because of the intricacies caused by title cessations, title changes, etc. Just more complicated.

Dataloader #2:

• We do not want to auto-overlay several categories of records, so we get the report from the OCLC Stats site, grab the reason for the update, and load that into a local 9XX field.

• We then make files of records in our system that we are comfortable overlaying en masse (mostly general collection monos) and then grab the latest versions of those from OCLC and overlay.

• We don’t overlay without review special collections records, serials, and A/V.
Updated records as a result of merges…

- Data loader #1: We had to handle these separately because our record distribution to the other UC campus libraries required our using a “delete” and a “new” delivery to them

- Data loader #2: We used to do them manually, but it was too much work. A small study found that only about 1% were incorrect merges. Now we overlay without review!
Submit questions in Chat. Send chat to “Everyone”

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