



OCLC Cataloging Community Meeting: WorldCat Updates

18 June 2021



Nathan B. Putnam

Director, Metadata Quality

Welcome



OCLC Cataloging Community
Meeting

18 June 2021

Today's Schedule



First sessions

- Welcome
- WorldCat updates
 - Putnam
 - Culbertson
- Diversity, Equity, Inclusion
 - Baxmeyer
 - Brewer, Huang, Schlottmann
 - Lown, Whittenberger
- Short break

Today's Schedule



First sessions

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- WorldCat updates
 - Putnam
 - Culbertson
- Diversity, Equity, Inclusion
 - Baxmeyer
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Final sessions

- OCLC product updates
 - Whitehair
- OCLC cataloging updates
 - Metadata quality staff
- 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 others attending this session

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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 via 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](#)

Session: WorldCat updates

WorldCat Controlling & Enrichment Updates



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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)

 Library and Archives
Canada

Bibliothèque et Archives
Canada

Canada

DEUTSCHE
NATIONAL
BIBLIOTHEK

LIBRARY
LIBRARY
OF CONGRESS

KB } national library
of the netherlands

BIBLIOTECA
NACIONAL
DE ESPAÑA

BNE



Art & Architecture Thesaurus® Online

Te Puna Mātauranga o Aotearoa
NATIONAL LIBRARY
OF NEW ZEALAND



RVM
RÉPERTOIRE DE VEDETTES-MATIÈRE
DE L'UNIVERSITÉ LAVAL

Controlling headings

- Controlling information
 - Cataloger initiated controlling → oclc.org/control-headings
 - Automated controlling service → oclc.org/heading-control-service
- Subject controlling quick stats
 - LCSH/LCGFT – 86% of records
 - MeSH – 52% of records
 - AAT 2.2% of records
 - 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
 - Control all controllable headings
 - Update headings as applicable
 - 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

The screenshot shows the OCLC WorldShare Collection Manager interface. At the top, there is a navigation bar with the OCLC logo, a search bar containing "How can we help you?", and links for "Release Notes", "System Status Dashboard", and "Contact OCLC Support". Below the navigation bar is a breadcrumb trail: "Home » Metadata Services » WorldShare Collection Manager » Choose your Collection Ma". The main content area is titled "Enable WorldCat updates" and includes a sub-header "Last updated: Feb 9, 2021". The text instructs users to follow instructions to enable WorldCat updates in Collection Manager to get updated MARC records. There are two main sections: "Configure institution settings" and "Configure institution record settings". Under "Configure institution settings", there are two numbered items: "1. OCLC Symbol" with a radio button selected and the text "Verify that your OCLC Symbol is selected", and "2. Reports" with a radio button selected and the text "Enable emailed reports". A link is provided for more details: "For a complete list and details about institution settings, see [Collection Manager Institution settings](#)." Under "Configure institution record settings", there is a sub-section "Enable MARC Records" with the text: "Use the MARC Records setting to enable record delivery. Note that collection-level record delivery settings will remain disabled. You will need to enable record delivery". On the right side, there is a "Table of contents" sidebar with a list of sections: "1. Configure institution settings", "2. Configure institution record settings", "2.1. Enable MARC Records", "2.2. Customize Records", "2.2.1. All Collections", "2.2.1.1. Holding library code (049 \$a)", "2.2.1.2. Delete Fields", "2.2.1.3. Delete Subfields", "2.2.1.4. Add Fields", "2.2.2. Knowledge Base Collection 856 Field", "2.2.3. WorldCat 856 Field", "2.2.4. Local Data", "2.3. WorldCat Updates", "2.3.1. Watch a video.", "2.4. Record Delivery", "2.5. Cataloging Partner Options", and "3. Watch a video".

WorldCat updates: Corrections supplied automatically



Becky Culbertson

Serials Cataloging Librarian

California Digital Library

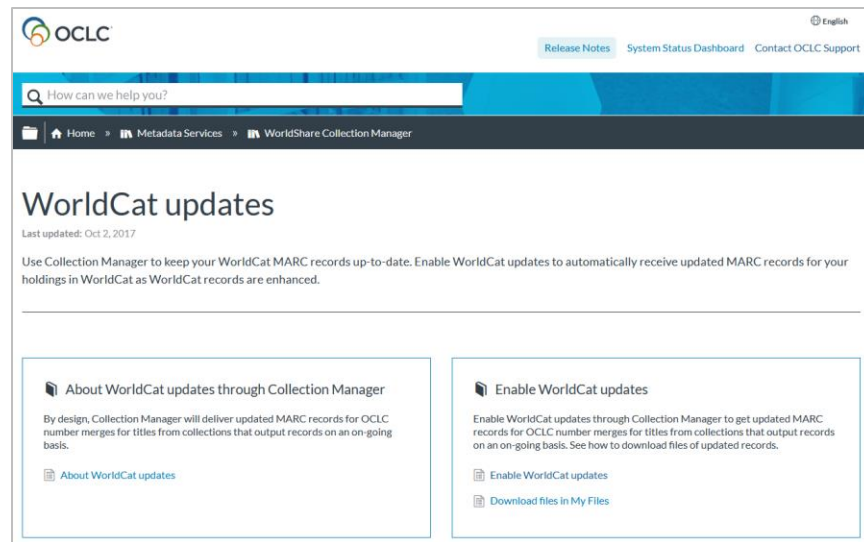
WorldCat updates:

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!



The screenshot shows the OCLC website interface for 'WorldCat updates'. At the top, there is the OCLC logo and navigation links for 'Release Notes', 'System Status Dashboard', and 'Contact OCLC Support'. A search bar is present with the text 'How can we help you?'. Below the search bar is a breadcrumb trail: 'Home > Metadata Services > WorldShare Collection Manager'. The main heading is 'WorldCat updates', with a sub-heading 'Last updated: Oct 2, 2017'. The main text reads: 'Use Collection Manager to keep your WorldCat MARC records up-to-date. Enable WorldCat updates to automatically receive updated MARC records for your holdings in WorldCat as WorldCat records are enhanced.' Below this text are two columns of content. The left column is titled 'About WorldCat updates through Collection Manager' and contains a link 'About WorldCat updates'. The right column is titled 'Enable WorldCat updates' and contains two links: 'Enable WorldCat updates' and 'Download files in My Files'.

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

Customize Records | **WorldCat Updates** | Record Delivery | Cataloging Partner Options

WorldCat Updates

* Required field

Update Option

OCLC Symbol(s)* ?

Update Conditions

Receive updates for any change to the WorldCat master record

Receive updates for selected criteria:

Include | Exclude

Updates Will Include

Field Changes in Master Record

Tag	8	8	0	Ind 1	Any	Ind 2	Any	+ - Reset	?
Tag	2	4	7	Ind 1	Any	Ind 2	Any	+ -	

Encoding Levels Changes

<input checked="" type="checkbox"/> Blank	<input type="checkbox"/> 1	<input type="checkbox"/> 4
<input type="checkbox"/> 5	<input type="checkbox"/> 7	<input type="checkbox"/> 8
<input checked="" type="checkbox"/> I	<input type="checkbox"/> K	<input type="checkbox"/> M

Other Changes

- Date/Publication Status (DtSt) changes
- 040 changes to include 040 \$e rda

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)
 - Monos: a few hours done once a month.
 - Serials: variable but usually a few hours a week. More if cessations, or title changes are involved.
- Data loader #2 (all formats)
 - 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

Customize Records WorldCat Updates Record Delivery Cataloging Partner Options

Record Delivery

Customize how often and under what conditions your records will be delivered.

Format

Delivery Frequency ?

File Output

- Deliver my serials in a separate file (.ser)
- Deliver records for WorldCat updates in a separate file (.wcholdings)

Uniform Resource Identifiers (URIs)

Name Headings Identity Services

- GND Authorities
- LC/NACO Authority File

Subject Headings Identity Services

- GND Authorities
- LC Subject Authority File
- MeSH Authorities

MARC customization – Reason for record output


Customize Records WorldCat Updates Record Delivery Cataloging Partner Options

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 Ind 1 Ind 2   [Reset](#)

Delete Subfields

Tag Ind 1 Ind 2 Subfield   [Reset](#)

Add Fields

 	Tag <input type="text" value="999"/>	Ind 1 <input type="text" value="Blank"/>	Ind 2 <input type="text" value="Blank"/>	  Reset
 	Subfield <input type="text" value="a"/>			 
	Value	<input type="text" 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 AV.

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!



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Submit questions in Chat.
Send chat to **“Everyone”**

