



OCLC Cataloging Community Meeting

15 January 2021



Nathan Putnam

Director, Metadata Quality

Welcome

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)
- Questions/Trivia contest
- Short break

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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

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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

The screenshot shows the OCLC Cataloging and Metadata community homepage. At the top, there is a search bar and a navigation menu with links for Community Home, Discussions, News, Events, and Support & Training. Below the navigation, there are three featured cards: a green card with a library aisle image, a purple card for an OCLC Cataloging Community Virtual Meeting on January 15, 2021, and an orange card for WorldCat Validation Notes. The main content area is divided into 'Recent Discussions' and 'News' sections. The 'Recent Discussions' section shows two posts: 'Thoughts on post-pandemic technical services?' by Marti Heyman and 'Welcome to the Cataloging & Metadata Community Center space' by Nathan Putnam. The 'News' section shows two news items: a reminder for the January 15 meeting and a survey deadline notice. A sidebar on the right contains a welcome message and a list of related services and topics.

Cataloging and Metadata

Search the Cataloging and Meta

Community Home Discussions News Events Support & Training

OCLC Cataloging Community Virtual Meeting (15 January 2021)
Join OCLC for cataloging updates, news and presentations by community members

WorldCat Validation: Notes

Recent Discussions

[Thoughts on post-pandemic technical services?](#)
Marti Heyman (OCLC) Posted 14 December 2020 in [Cataloging & Metadata](#)

[Welcome to the Cataloging & Metadata Community Center space](#)
Nathan Putnam (OCLC) Posted 04 November 2020 in [Cataloging & Metadata](#)

News

13 January 2021
 [Reminder: Register for OCLC Cataloging Community Meeting, 15 January 2021](#)
Please join us on [15 January 2021](#)

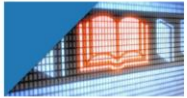
12 January 2021
 [OCLC survey deadline is fast approaching – Share your thoughts by 31 January](#)
Time is running short to participate in an OCLC survey, "[Libraries and the Sustainable Deve](#)

The Cataloging and Metadata community is a place for information and discussion on cataloging practices, workflows, and the following services/topics:

- [CatExpress](#)
- [Connexion](#)
- [FAST](#)
- [OCLC and Linked Data](#)
- [VIAF](#)
- [WorldCat Metadata API](#)
- [Z39.50 Cataloging](#)

<https://www.oclc.org/community/cataloging-metadata.en.html>

Session: Integrating Collection Manager's WorldCat cataloging partner collections into your GOBI workflow



OCLC Cataloging Community Meeting

15 January 2021



Jody Stroh

Product Manager, Metadata Services


Introduction



Charles Hillen
GOBI Library Solutions

WorldCat Cataloging Partners
via GOBI

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




Shannon Burke
Texas A&M University Libraries

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





Kim Wiljanen
Michigan State University

MICHIGAN STATE UNIVERSITY LIBRARIES

WorldShare Collection Manager
Partnerships

Libraries
MICHIGAN STATE UNIVERSITY
Kim Wiljanen
Library Assistant



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.

Tech Spec (cont'd)

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.
 - GOBI offers naming conventions to ensure consistency across collections
- The Collection ID Type is identified.
 - Subaccount
 - Fund Code
 - Location Code

Tech Spec (cont'd)

If Collection ID Type is Subaccount:

- Create a collection for each subaccount number without the dash.
 - 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.

Tech Spec (cont'd)

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.
 - If label supply/application is required, font and placement details are included in the processing section of the spec.
 - 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.
 - 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

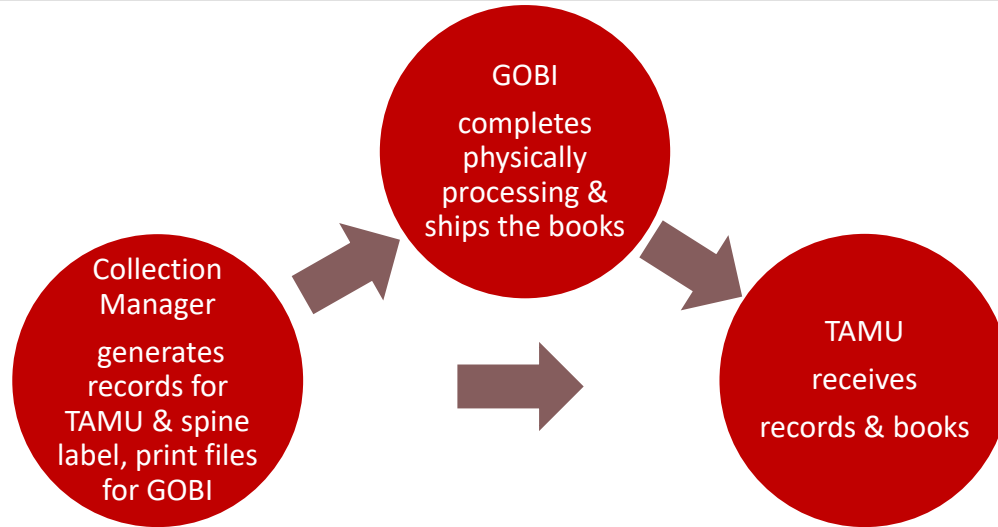
Overview

- ❖ 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)

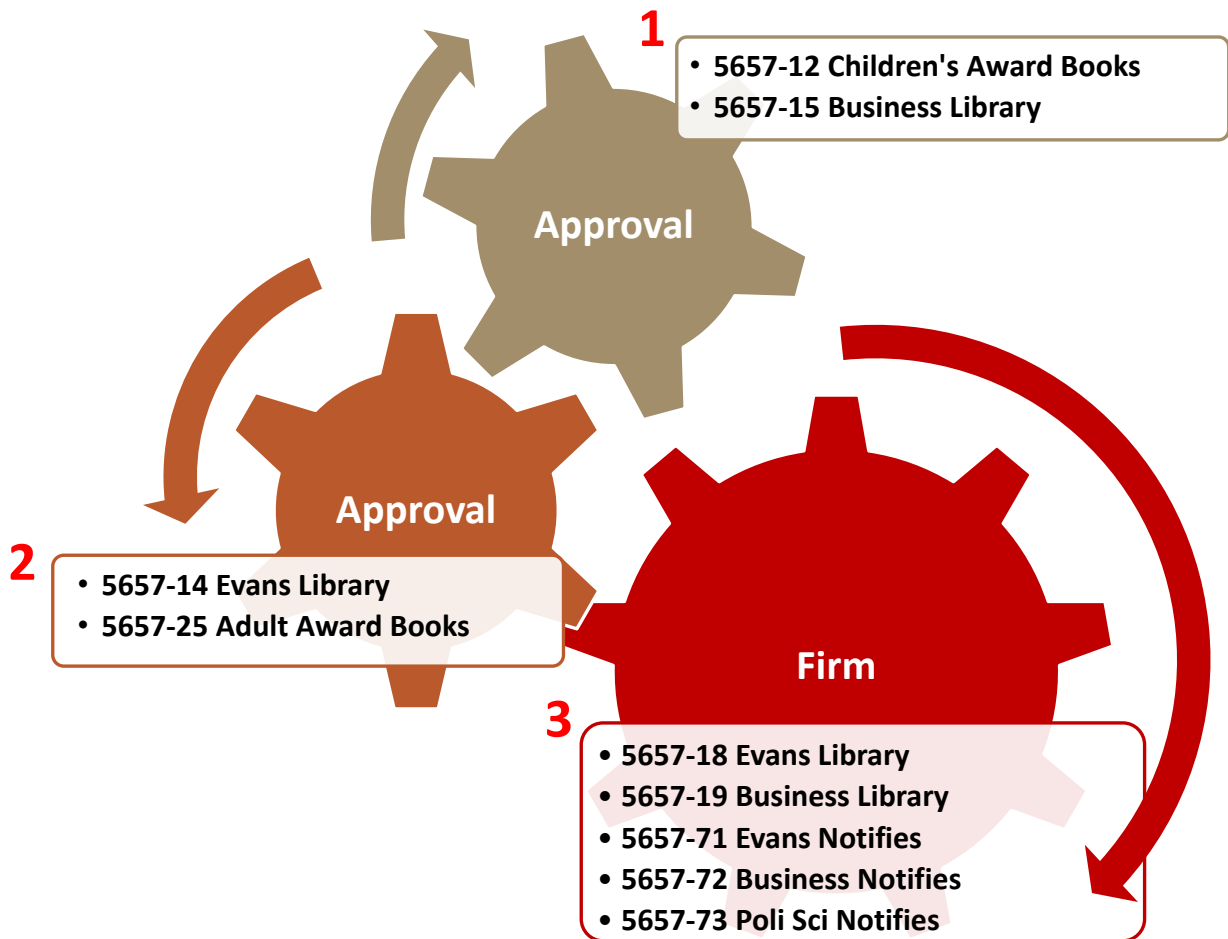


Process Continued



Considerations & our GOBI Accounts

- ❖ Acquisition Methods
- ❖ Locations
- ❖ Priority
- ❖ Format
- ❖ Funds



Records Delivered Weekly

- Record Manager
- Collection Manager
- My Files
 - Uploads
 - Downloads


Downloads

Records and Reports KB Downloads

Records and Reports

Filter by [Reset](#)

Downloaded Hide downloaded files

Results 1 - 10 of 31  Rows 

3 Weekly Files

1	metacoll.TXA.wcp.YDX.D20201218.T213028.1.mrc.zip	Approval	Records - Cataloging Partner	4 KB	12/19/2020	12/21/2020	Download
3	metacoll.TXA.wcp.FIRM.YDX.D20201218.T213028.1.mrc.zip	Firm	Records - Cataloging Partner	116 KB	12/19/2020	12/21/2020	Download
2	metacoll.TXA.wcp.APPR.YDX.D20201218.T213028.1.mrc.zip	Approval	Records - Cataloging Partner	298 KB	12/19/2020	12/21/2020	Download

Facilitates Bulk Processes



```
MarcEditor: cd5fr4s1xfrmarccbc9b5bd04d4615a1b3d2b0cd269ef9_2021-01-07_10-10-09-PM.tmp
File Edit Fonts Reports Tools OCLC WorldCat Plug-ins Help
[LDR 01294cam 2200421i 4500
=001 on1121083228
=003 OCoLC
=005 20200625072024.9
=008 190929s2020\|nyu\|000\|eng\|d
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=245 10\\$aShooting down heaven /$cJorge Franco ; translated from the Spanish by Andrea Rosenberg.
=264 1\\$aNew York, N.Y. :$bEuropa Editions,$c2020.
=300 \\\$a341 pages :$c21 cm
=336 \\\$atext\$btxt\$2rdacontent
=337 \\\$aunmediated\$bn\$2rdamedia
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=994 \\\$a92\$bTXA
```



❖ 900 Fields included in records can be helpful

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

=947 \\\\$aA14850730244 → (Library Barcode)

Loading Records in our Catalog

Using bulk import of records allows us to automatically create purchase orders



Fiscal Year, Ledger, Fund

Bulk Imp Order Settings Order Type	Price Default Code	Ledger Default	Fiscal Period Name Default
Approval	papp	21 Monographs	2021
Firm Order	sel24	21 Monographs	2021

Bulk load into ILS

Processed: 121
Added: 121
Discarded: 0
Rejected: 0
Errored: 0
Replaced: 0
Merged: 0
Deleted: 0

Mfhd 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

Cataloging Bulk Import Order Settings

Order / Vendor | Price / Fund

Order Location: AcqMono Conventional | Order Type: Firm Order

PO Number
Field: Subfield:
Ind 1: Ind 2:

Line Item Type
Field: Subfield: Default: Single-part
Ind 1: Ind 2:

Vendor
Code: ZYBP%
Acct: Conventional Orders

Vendor Reference Number
Field: Subfield:
Ind 1: Ind 2:

Vendor Title
Field: Subfield:
Ind 1: Ind 2:

Piece Id
Field: Subfield:
Ind 1: Ind 2:

Number of Copies per Line Item
Field: Subfield: Default: 1
Ind 1: Ind 2:

Notes
Field: Subfield:
Ind 1: Ind 2:

Instructions
Field: Subfield:
Ind 1: Ind 2:

Requester
Field: Subfield:
Ind 1: Ind 2:

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!

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COORDINATOR OF MONOGRAPH ACQUISITIONS

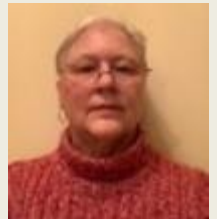
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WorldShare Collection Manager Partnerships



Kim Wiljanen
Library Assistant





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





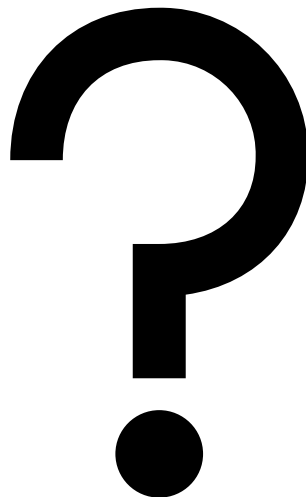
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chillen@ybp.com



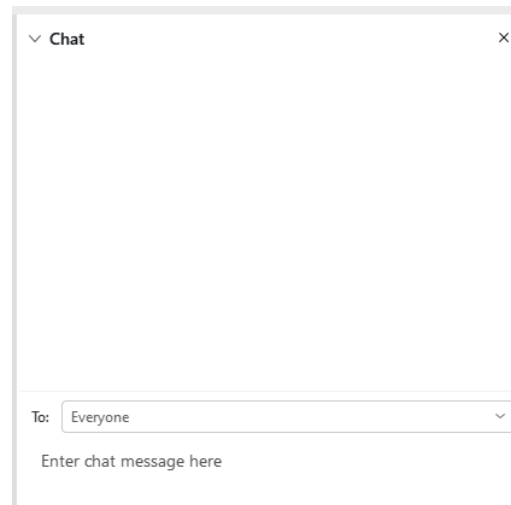
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Submit questions in Chat.
Send chat to **“Everyone”**





OCLC Cataloging Community Meeting

15 January 2021