Cataloging Efficiencies
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OCLC Update

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Patron Driven Acquisitions and OCLC

• Exposure in WorldCat and WorldCat Local
  • Add holdings to WorldCat; relevancy ranking in WorldCat Local
  • Add data to WorldCat knowledge base; WorldCat Local “view now” link

• Impact on WorldCat Resource Sharing
  • Block all e using option in policies directory
  • Deflect per title using local holdings records

• Local discovery records
  • WorldCat Cataloging Partners
  • New WorldCat knowledge base record output option coming soon
Shared data about the world’s libraries.
Find and get it.

Shared infrastructure to manage and share resources across libraries and across communities.
WorldShare Metadata - coming soon!

- Collection management and record management functionality with platform Web services coming over the next three years
- Complete metadata management for physical, licensed, and digital resources across multiple formats
- Integrated with other WMS components such as WorldShare Acquisitions and WorldShare Circulation; also works with traditional integrated library systems (ILS)
- Initial collection management functionality in pilot; coming later in 2012 to all OCLC cataloging subscribers

www.oclc.org/productworks/worldsharemetadata
Collection management phase 1

Automatically receive customized MARC records for e-titles included in dynamically changing collections defined in the WorldCat knowledge base including mass digitized HathiTrust titles to provide patrons access to the titles and content from within the local library catalog.
Pilot started March 2012

- Drexel University
- Henry Ford Hospital
- McGill University
- Ohio State University
- Southern Methodist University
Implementation process

- Library requests activation
- OCLC provides access to Manage Collections within WorldShare Metadata and defines FileX FTP account
- Library defines collections in the WorldCat knowledge base
- Library activates MARC Record Delivery for institution and for specific collections
- Library defines MARC record customization options
- System outputs records: separated by new, updated, deleted
- Library receives daily report and file of records
- Library accesses monthly summary report
Over 50 publishers and aggregators of E books are represented in the WorldCat knowledge base. Some examples include:

<table>
<thead>
<tr>
<th>Books24x7</th>
<th>Knovel Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>DawsonEra</td>
<td>Safari Books Online</td>
</tr>
<tr>
<td>Ebook Library (EBL)</td>
<td>Springer</td>
</tr>
<tr>
<td>EBSCO</td>
<td>Informa Taylor &amp; Francis</td>
</tr>
<tr>
<td>ebrary</td>
<td>Wiley</td>
</tr>
<tr>
<td>Ingram MyiLibrary</td>
<td></td>
</tr>
</tbody>
</table>
What records get included

• New - Titles added to collections in the WorldCat knowledge base with MARC Record Delivery enabled that have not previously been delivered via this process (based on OCLC number)

• Updated - Titles in collections in the WorldCat knowledge base with MARC Record Delivery enabled where provider/collection, URL, proxy server, etc. changed

• Deleted - Titles in collections in the WorldCat knowledge base with MARC Record Delivery enabled where library no longer has access to the title from any provider
Customization Options

• 049 holding library code
• Record standard (MARC21 with MARC8, Dublin Core, etc.)
• Fields and subfields to delete
• Fields and specific data to add
  • Free-form text
  • Transaction type
  • WCKB Collection Level Note
  • WCKB Collection Name
  • WCKB Coverage Dates
  • WCKB Coverage Enumerations
• WCKB Coverage Note
• WCKB Location
• WCKP Provider Name
• WCKB Title Level Public Note
• Customized Edits
Manage Library Holdings

- Upload Library Holdings File
- Download Library Holdings File
- Limit Access by IP Address
- Set Holdings in Worldcat
- Enable MARC Record Delivery
- Free-form text
- Transaction type
- WCKB Collection Level Note
- WCKB Collection Name
- WCKB Coverage Dates
- WCKB Coverage Enumerations
- WCKB Coverage Note
- WCKB Location
- WCKP Provider Name
- WCKB Title Level Public Note
- Customized Edits
Record output process

- Retrieve master record from WorldCat
- Delete existing 856 URLs
- Add URL(s) from WorldCat knowledge base
- Apply user customization edits
- Output MARC record
Master record vs. output record

=LDR 03220cam 2200613i a 4500
=001 ocm55703285\ 
...
=029 1 \ $aNZ1$b12042434 ← removed from CB record
=029 1 \ $aNZ1$b13337455 ← removed from CB record
...
=049 \ $aDXUU ← added to CB record
...
=599 \ NEW ← transaction type added to CB record
Master record vs. output record

=650  \0\$aData encryption (Computer science) ← retained in CB record

=650  \7\$aCOMPUTERS\$xSecurity\$xCryptography.\$2bisacsh ← removed from CB record due to indicator = 7

=655  \4\$aElectronic books. ← removed from CB record due to 655 tag

...

=710  2\$aCRC Press ← provider name added to CB record

=793  0\$aInfoSECURITYnetBASE ← collection name added to CB record
=856 40$3Ebook
Library$uhttp://public.eblib.com/EBLPublic/PublicView.do?ptiID=216476 ← existing 856 removed from CB record

=856 40$3ebrary$uhttp://site.ebrary.com/id/10161961 ← existing 856 removed from CB record

[Along with six other existing 856 fields in master record]

=856 40$uhttp://www.library.drexel.edu/cgi-bin/r.cgi?url=http://marc.crcnetbase.com/isbn/9780203913512$zClick for resource ← URL from WCKB with $z public note defined by library added to CB record
OCLC Usage Stats

- Cataloging tab (previously Online Cataloging)
  - Metadata Collections
    - Daily Metadata Collections New Records
    - Daily Metadata Collections Updated Records
    - Daily Metadata Collections Deleted Records
    - Monthly Metadata Collections
- View online and/or setup automatic email
<table>
<thead>
<tr>
<th>Provider</th>
<th>Collection name</th>
<th>Title</th>
<th>ISBN/ISSN</th>
<th>OCLC number</th>
<th>File Name</th>
<th>Multiple occurrence</th>
</tr>
</thead>
</table>
## Monthly Metadata Collections -- Institution

**Reporting Period:** March 2012 - December 2011

| Institution | OCLC INC |
| Symbol      | OCL      |

<table>
<thead>
<tr>
<th></th>
<th>Mar-12</th>
<th>Feb-12</th>
<th>Jan-12</th>
<th>Dec-11</th>
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</thead>
<tbody>
<tr>
<td>Records delivered</td>
<td>150</td>
<td>110</td>
<td>240</td>
<td>105</td>
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</table>

<table>
<thead>
<tr>
<th>Provider</th>
<th>Collection name</th>
<th>Mar-12</th>
<th>Feb-12</th>
<th>Jan-12</th>
<th>Dec-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wiley</td>
<td>History collection</td>
<td>35</td>
<td>50</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Springer</td>
<td>Biological sciences</td>
<td>8</td>
<td>20</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Elsevier</td>
<td>Medical collection</td>
<td>5</td>
<td>25</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>
Questions?