

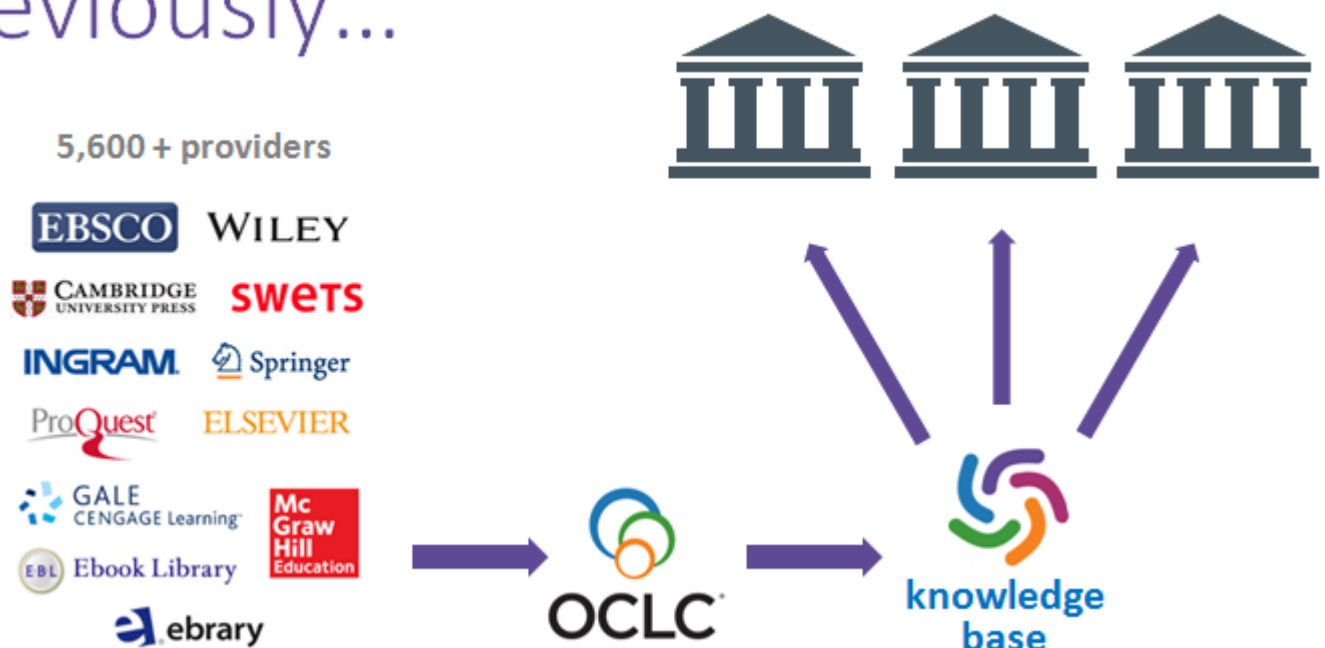
Cooperative Management of the Global Knowledge Base Data

As a cooperative with a long-standing tradition of relying on the expert community for cataloging, OCLC believes that making the knowledge base cooperatively managed is a positive future direction and one that will help create efficiencies for everyone in the community while improving data quality for all. To that end, we are introducing cooperative management of global knowledge base data. These features have been implemented only in the WorldShare interface in three phases over three releases. OCLC and the knowledge base team will continue to maintain global knowledge base data as we always have, but we have added the ability for our community to participate in data quality assurance (QA) and maintenance.

For more information on knowledge base cooperative data management, including an overview of the phases and individual phase guides, visit the “Participate in Cooperative Management” section on the [knowledge base documentation website](#).

Phase Zero – No Cooperative

Previously...

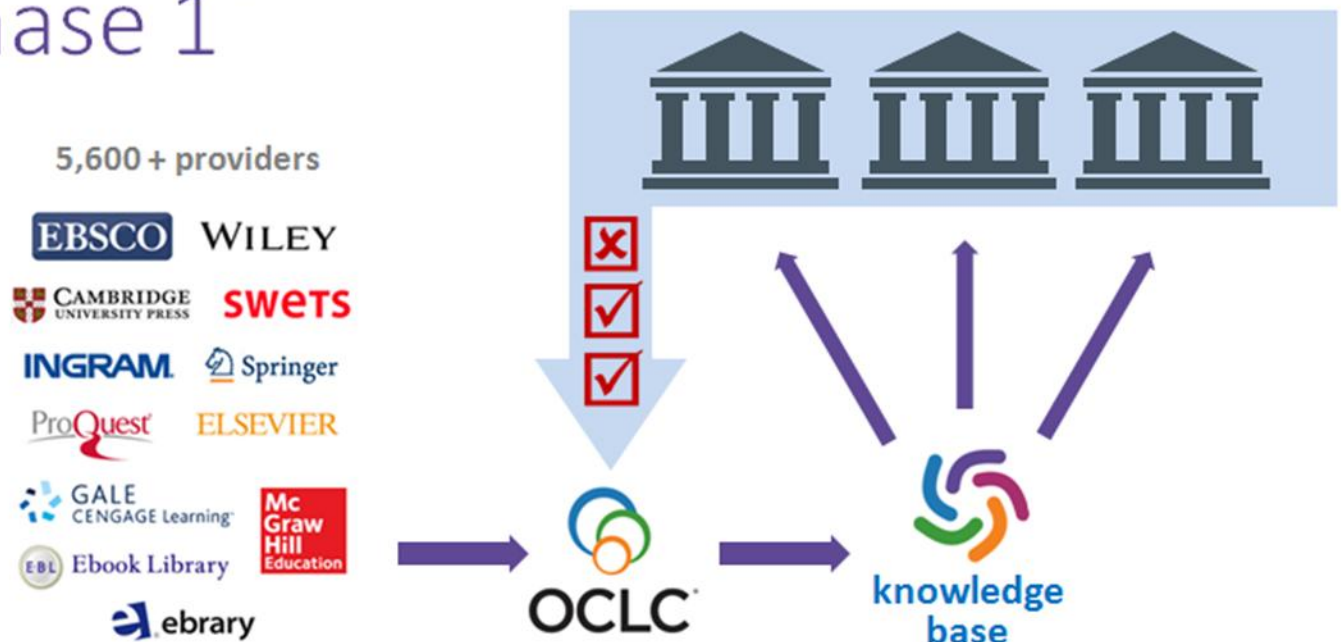


Prior to the March 16, 2014 install, the data loading process was maintained solely by OCLC. OCLC, through multiple means, obtains data from 5600+ data providers (from large ones like EBSCO to little one collection organizations) and manages that data. We do all the work of normalizing and properly formatting the data for load into the system. Then we load it into the platform where it is shared out to the libraries using the knowledge base. Libraries then automatically get the updates and title changes for their selected collections. Each change to a selected collection is made in the locally held copy of the global data that libraries then

customize. Some create gap collections for missing titles and otherwise fix problems that exist in the global knowledge base data. Since these fixes are to the local copy only, this means libraries have their own version of all the data in the global knowledge base and that, to some degree, effort is being duplicated across all participant libraries, but the global data is not benefited by their work. In other words, it is not a cooperative model for managing the knowledge base.

Phase One – Members Approve / Deny Data Changes

Phase 1



1. Member libraries approve/deny changes before they are made.

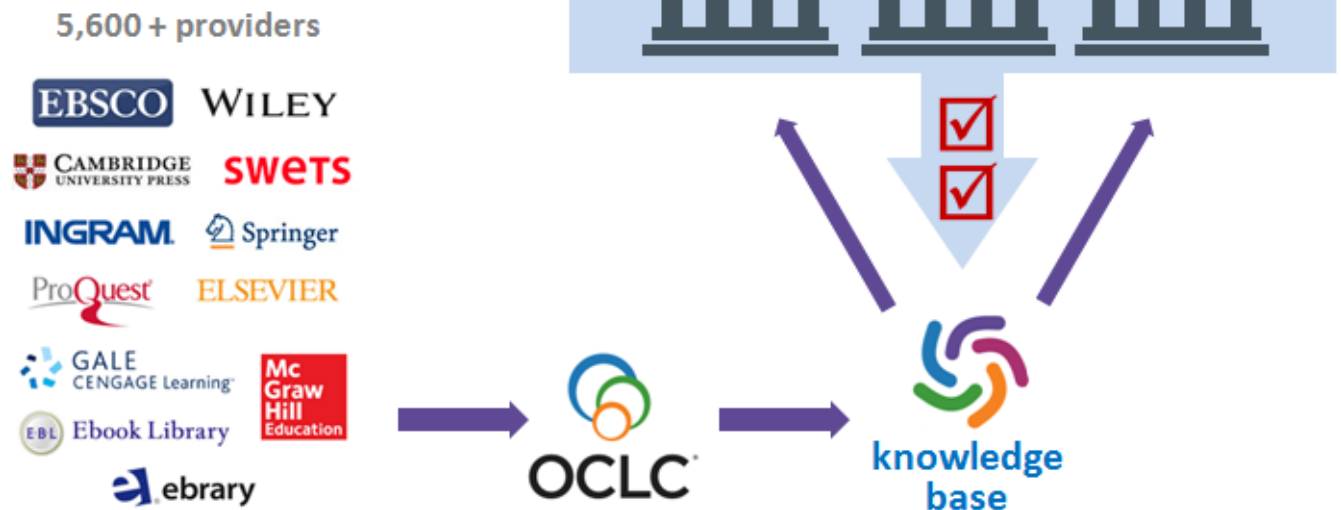
With the March 16, 2014 install, we rolled out phase one of cooperative management of the global knowledge base. This permits libraries that are using the data to help us validate the quality of the data before it enters the global knowledge base – a sort of federated QA program. For all changes OCLC tries to make to the data, users can review the exact changes (new titles added, titles updated, and titles deleted) from providers – every provider and collection in the global knowledge base. Details about individual title changes are exportable and are kept and displayed for ninety days. After ninety days, the history entries will still show the updates, but the individual title change details will no longer be available.

Each collection has a threshold, or goal, for approval / denial based on the number of libraries holding the collection. Once the threshold is met, if it is approved, then data is sent through the loading process, or if it is denied, it is not loaded. In the event that the threshold is never met, the data will be loaded after a certain number of days have passed. Information about approvals and denials will be displayed in the user interface to those with the collection selected including information about the users making the approvals / denials. Information displayed includes time stamp, decision, name, institution, and comment. Users are encouraged to comment on decisions and to discuss decisions in the [discussion forum](#) and / or the [kb-l listserv](#). To facilitate this discussion, a link to the discussion forum is displayed with the information about the decision. Phase one gives a view into the global changes before they are loaded and the ability to approve or deny

those changes and affect the data load. OCLC continues our workflow exactly as we do in the Phase Zero view: we still manage, process, and QA data, but in phase one the community of users enhances our quality assurance process.

Phase Two – Members Submit Changes

Phase 2

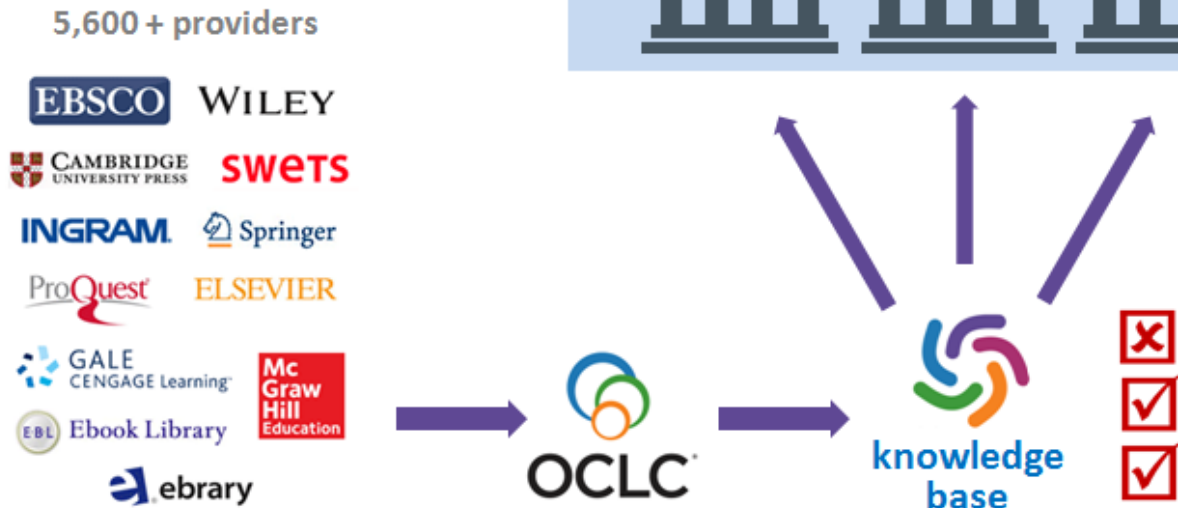


2. Members can make changes to existing knowledge base records

With the May 17, 2014 install, we rolled out phase two of cooperative knowledge base data management, which allows libraries to submit fixes to an individual title or titles within a collection to the global knowledge base. This helps create efficiencies for everyone in the community while improving data quality for all. After submission, this new data becomes a candidate for loading to the global knowledge base and thus goes through the approval process just as global knowledge base data updates do (see Phase One above). The submitting user's information will be shown with the submitted changes throughout the approval process.

Phase Three – Members Add / Delete Titles and Add New Collections

Phase 3



3. Members can add new records and new collections.

With the July 27, 2014 install, we rolled out phase three of cooperative management of the global knowledge base. Phase three of cooperative management of the global knowledge base allows users to add new records to or delete records from existing global knowledge base collections as well as to contribute new collections to the global knowledge base. These functions ease the need for gap collections and help create efficiencies for everyone in the community while improving data quality for all. After submission, this new data becomes a candidate for loading to the global knowledge base and thus go through the approval process just as global knowledgebase data updates do (see Phase One above). Newly submitted collections, will go through a review process by OCLC before entering into the global knowledge base. The submitting user's information will be shown with the submitted changes throughout the approval process.

Phase Four – Feedback

We encourage you to discuss the features and functions of knowledge base cooperative data management on the [discussion forum](#) or the [kb-l listserv](#). If you have feedback or questions for OCLC please post in the forum, on KB-L, or send your comments to support@oclc.org. We welcome any suggestions for improving or enhancing cooperative features for greater utility by our community in future releases.

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