OCLC Update

Glenn E. Patton
Director, WorldCat Quality Management
Agenda

• Cataloging news including FAST
• WorldCat Discovery
• WorldShare Metadata and the WorldCat knowledge base
• Questions and answers
What’s New at OCLC

ALA Annual Ediﬁon, June 2014

Congratulations to the ﬁrst ARL and 200th library to go live with WMS!

In June 2014, the WorldShare® Management Services (WMS) community reached the milestone of having 200 libraries live. Congratulations to the University of Delaware Library, the 200th library—and the ﬁrst ARL member library—to go live with WMS.

The University of Delaware Library worked with OCLC to ensure the new services have the features and functionality required to meet the needs of students, faculty and staff at a larger research institution. The library’s substantial contributions will enable further efﬁciencies in technical services and increased usability in library access services and end-user discovery.

"The University of Delaware Library is pleased to be at the forefront of this transition to cloud-based library management services for ARL libraries, and looks forward to working with OCLC to help guide its continued evolution."

Suzanne Bystrom, Vice Provost and May Morris University Librarian, University of Delaware

"I think in many ways, WorldShare Management Services is ahead of its time and lays the groundwork for the next ﬁve to ten years of transformative change."

Gregg A. Silvis, Associate University Librarian for Information Technology and Digital Imaging, University of Delaware Library
The OCLC cooperative: a nonprofit, membership organization

Public purposes:
Further access to the world’s information
Reduce the rate of rise of library costs

72,000 libraries in 170 countries
Cataloging News
Connexion News

• **Connexion client 2.51** is now available for download from the Software download area of Product Services Web:
  
  – All Connexion client 2.40 libraries must **upgrade** to either Connexion client 2.50 or 2.51 by **July 31, 2014**
  
  – With May 2014’s Connexion release, OCLC no longer automatically deletes bibliographic records from the online save file. Instead, **they stay in the online save file until the user deletes them**
MARC Update 2014

• Most changes from MARC Update No. 16 were installed in early May
  – Technical Bulletin 263

• More, including MARC Update No. 17 and No. 18 coming later this year
  – Watch for Technical Bulletin 264
Controlling Headings in WorldCat

• Since 2012, newly added and replaced master records have been processed by the controlling software
  – As of June 30, a total of 61,881,603 records have at least 1 controlled heading
• Beginning in late June, retrospective processing has begun
• Investigation of controlling to other authority files is in process
Changes to Controlling

• Library of Congress validation records no longer used for controlling
  – Caused incorrect changes with $x and $v divisions
• “Series-like” phrases no longer used for controlling (Series: c)
• Automatic controlling blocked if matches to a 4XX field that is an unqualified personal name
Authority Files Conversions

• PCC RDA Authorities Task Group identified 3 conversion phases
  – Phase 1 (marking records that cannot be used without review): completed
  – Phase 2 (machine manipulation of data elements to create RDA forms): completed
    • Included spelling out of months in treaty headings
  – Phase 3 (recoding 7.5 million records as “RDA”): under discussion
“Hybrid Records” and the GMD

• How is OCLC creating “hybrid records”? What is the policy and plan?
  – OCLC is using macros to make add 33X fields, spell out appropriate abbreviations, and update headings to RDA form in non-RDA records
  – Existing GMDs will be left in place until the end of March 2016 in non-RDA records.
FAST (Faceted Application of Subject Terminology)

- Joint OCLC Research and Library of Congress project
- Provides a faceted version of the Library of Congress Subject Headings
- Available in various interfaces and downloadable versions

http://fast.oclc.org/searchfast/
8 categories of facets

<table>
<thead>
<tr>
<th>FAST Facet</th>
<th>MARC 21 field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronological</td>
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<tr>
<td>Corporate Names</td>
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<td>Events</td>
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<td>Titles</td>
<td>630</td>
</tr>
<tr>
<td>Topics</td>
<td>650</td>
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</table>
### FAST TERMS

Search results for: "magna carta"

Limit Results by: AI

Displaying 1 to 2 of 2

<table>
<thead>
<tr>
<th>Heading</th>
<th>Facet</th>
<th>Uses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magna Carta</td>
<td>title</td>
<td>1406</td>
</tr>
<tr>
<td>Australian Capital Territory--Canberra--Magna Carta Place</td>
<td>geographic</td>
<td>1</td>
</tr>
</tbody>
</table>

### TERM DETAILS

**Magna Carta** [Find in WorldCat]

**USED FOR:**
- Magna Charta
- Magna carta regis Johannis, XV die junii, MCCXV, anno regni XVII
- Velikaia Khartiia Vol'nostei
- Magūna K'arūt'a

**USAGE:**
- LC (2014) Subject Usage: 87
- WC (2014) Subject Usage: 1,406

**RECORD ID:**
- fst01356211

**SOURCES AND OTHER LINKS:**
- Magna Carta--(DLC)n 50064742
- Magna Carta--(uri)http://viaf.org/viaf/183464400

**LINKS TO FULL RECORD:**
- Permanent Link [http://id.worldcat.org/fast/1356211](http://id.worldcat.org/fast/1356211)
- RDF record [http://id.worldcat.org/fast/1356211/rdf.xml](http://id.worldcat.org/fast/1356211/rdf.xml)

[view MARC]
FAST (Faceted Application of Subject Terminology)

Benefits
- **Simple** to learn and apply
- Designed to facilitate faceted navigation
- **Modern in its design** (for example, useable in a linked data environment)

Enrichment
- Automated addition of FAST headings began in September 2013
- Applied only to records with English language-of-cataloging that already contain LCSH.
- 040 ‡d contains “OCLCF”
- Recognizing a FAST heading
  - 6XX, 2nd indicator ‘7’ & ‡2 fast
  - 6XX ‡0 contains the FAST record ID

When deriving new records, you may retain or delete FAST - that is a local decision.

Background on FAST
http://www.oclc.org/research/activities/fast.html

FAST in WorldCat

FAST FAQ
http://www.oclc.org/content/dam/support/worldcat/records/faceted-application-of-subject-terminology.pdf
What is WorldCat Discovery Services?

A single reference and discovery solution to replace FirstSearch and WorldCat Local

- Available to any library with a FirstSearch subscription in March 2014
- WorldCat Local/WMS transition began with a beta in April 2014
- Staff mode available in June 2014
- More functionality to come ...
Current FirstSearch subscribers receive:

- Single search of all content available through FirstSearch today (including Base Package databases), plus
  - 200+ million article-level records
  - Central index that represents more than a billion articles, e-books and other e-content*
- New user interface that adapts automatically to mobile devices
- Library-branded URL and custom branding
- Option to purchase remote database searching

* Access to full text depends on library subscriptions

Libraries with current holdings in WorldCat + WorldCat knowledge base receive:

- Local library collections listed first in search results
- Link resolution to full-text resources in e-content subscriptions
- Built-in A to Z list
- Option to add:
  - Real-time availability (if you have an interoperable ILS)
  - Group views
  - Course reserves
  - Remote database searching
  - Custom reporting via Adobe® Reports & Analytics

* Access to full text depends on library subscriptions
Visibility for library collections maintained in WorldCat and direct links to most popular content

WorldCat partner traffic
July 2012-June 2013

77 million referrals from partner sites
8.7 million click-throughs to libraries

Examples of the content providers represented in the central index
Integrated fulfillment options

- **Link directly to online full text** through the WorldCat knowledge base or a local OpenURL resolver
- **Borrow from another library***
  Built-in user-initiated interlibrary loan
- **Link directly to your OPAC** for availability
- **Buy items directly** from content providers

* For libraries with an interlibrary loan subscription
New discovery experience
Get Ready for WorldCat Discovery

1. Update your OPAC link and IP address information in the WorldCat Registry
2. Make sure your library’s WorldCat holdings are up-to-date
3. Request access to the WorldCat knowledge base and add local data
4. Identify your subscription (licensed) database content
5. Attend a “Getting Ready for WorldCat Discovery” webinar [http://oc.lc/getreadywebinars](http://oc.lc/getreadywebinars)
Provides a single integrated set of management services for libraries to improve visibility and efficiency, including services from OCLC, partners and libraries.
Managing records in WorldShare Metadata

- Create and replace WorldCat® master records using either the MARC 21 editor or the Text View editor, a simplified, labeled interface
- Set and delete WorldCat holdings
- Manage local holdings records (LHRs) and local bibliographic data (LBD)
- Save in-progress bibliographic records for later use
- Search and display Library of Congress authority records
- Incorporate auto-suggest FAST subject headings using the Text View editor
- Export bibliographic records via TCP/IP connection to your local system
- Currently available to WMS libraries; will be available to early adopters later in 2014
- There is no end of life date for Connexion
Managing collections in WorldShare Metadata

- Register your e-collections to **automatically** deliver and update **WorldCat MARC records** and maintain **WorldCat holdings** for all or subsets of your collection
- Ensures that the **bibliographic metadata** for all materials and **access URLs for e-content** are **continually updated** in your **discovery interface**
- Get **better user access**, **gain time** for other priorities, and see **improved return** on the investments you have made in your collections
- WorldShare Metadata is the ideal solution for **streamlining workflows** while managing increased **user demand for e-content**
updates… and holdings

knowledge base

holdings

My WorldShare Metadata Collection Manager and holdings
WorldCat knowledge base standard collections

- Over 11,000 content collections from over 5,700 providers
- Over 50 publishers and aggregators representing 13M E books including:
  
  - Books24x7
  - DawsonEra
  - Ebook Library (EBL)
  - EBSCO
ebrary
  - Ingram MyiLibrary
  - Knovel Library
  - Safari Books Online
  - Springer
  - Informa Taylor & Francis
  - Wiley
  - EBSCO ebook Library (EBL)
  - Springer
  - Informa Taylor & Francis
  - Wiley
Collections based on library holdings

http://oc.lc/autoload
Knowledge base

Previously...

5,700 + providers

EBSCO  WILEY  SWETS
CAMBRIDGE UNIVERSITY PRESS  INGRAM  Springer
ProQuest  ELSEVIER
GALE CENGAGE Learning  Ebook Library
McGraw Hill Education  ebrary

OCLC

knowledge base
Knowledge base cooperative data management

New – Phase 1

5,700 + providers

1. Member libraries approve/deny changes before they are made.
<table>
<thead>
<tr>
<th>Title</th>
<th>Title URL</th>
<th>Content Availability</th>
<th>Identifiers</th>
</tr>
</thead>
</table>
Knowledge base cooperative data management

New – Phase 2

5,700 + providers

EBSCO  WILEY
CAMBRIDGE UNIVERSITY PRESS  SWETS
INGRAM  Springer
ProQuest  ELSEVIER
GALE CENGAGE Learning
Ebook Library  McGraw Hill Education
ebrary

2. Members can make changes to existing knowledge base records
Entry: 49th Parallel

Add Changes to Global Collection  Save

Title: 49th Parallel
Title ID: 9291741
Format: Journal
Title URL: http://Search.ebscohost.comdirect.asp?db=31h&id=8WIL&scope=site
OCN: 646811935
Override OCN:
Vendor ID:
ISSN: 1753-5794
eISSN:
Coverage:
  Dates:
  Full Text: From 2012-01-01 to present
  Indexed: From 2012-01-01 to present
Enumeration:
  Full Text
  Indexed
Soon – Phase 3

5,700 + providers

3. Members can add new records and new collections.
Add collection to the global KB
5 reasons to register electronic collections in the WorldCat knowledge base

1) **Automatic management** of WorldCat holdings and **delivery** of WorldCat MARC records for electronic materials

2) **OpenURL resolution**, A to Z journal list and **easy access** to electronic resources from search results

3) **Quick and easy sharing** of your electronic content

4) Manage **budgeting, ordering, and acquisition** of electronic resources

5) **Integrated link resolution** in a full-featured license management solution
WorldCat Collection Sets

- Provider by provider, collections will migrate to the WorldCat knowledge base and WorldShare Metadata.
- Library created electronic sets will be created and maintained using the knowledge base cooperative data management functionality.
- Additional information coming soon.
<table>
<thead>
<tr>
<th>OCLC WorldCat Metadata API</th>
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<tbody>
<tr>
<td>• Manage WorldCat data through integration with library- and partner-built applications</td>
</tr>
<tr>
<td>• Add and enrich <strong>WorldCat records</strong> and maintain <strong>WorldCat holdings</strong> and local bibliographic data</td>
</tr>
<tr>
<td>• Enhance existing systems to <strong>streamline workflows</strong> and <strong>improve access to library collections</strong> in any creative way that can be imagined</td>
</tr>
<tr>
<td>• Integrated into <strong>MarcEdit</strong></td>
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</table>
The **WorldCat** knowledge base and **OCLC WorldShare Metadata** are included in your cataloging subscription.
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