

OCLC Enhance Sharing Session

ALA Annual Conference, Washington, D.C.

Friday, 2010 June 25, 10:30 a.m.-12 noon

Walter E. Washington Convention Center, Room 102A

Report by Linda Gabel, OCLC

Edited by Jay Weitz

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Enhance Coordinator Jay Weitz started the meeting with introductions, and the distribution of the sign-up sheets. OCLC colleagues Linda Gabel and Robert Bremer were also present and helped answer many questions.

As before, he had solicited questions in advance, receiving one asking about credits for Expert Community activity. That decision is still pending as OCLC looks at the whole universe of credits. Jay reminded the group that in order for the Minimal-Level Upgrade credit to be awarded it is not enough just to upgrade the record, the Encoding Level value must be changed to "1". There is no credit for controlling headings alone, other activity must be present. There was a question from the floor if there was a difference in the original cataloging credit if a record was added from the workform, or from the derive action. The answer was that the credit was the same. Changing just the Type or BLvl (where allowed) also does not result in a credit.

Jay gave an update to the group about the Duplicate Detection and Resolution software. The original DDR ran from 1991 to 2005 for the books format only, when changes in the database structure and cataloging systems meant it could no longer be supported. The new version of DDR works on all bibliographic formats. Testing started with targeted subsets of records from May 2009 through early 2010. During that time, staff reviewed every merge (15,000), refining the algorithms, and performing some simultaneous database cleanup. Since DDR moved into production, it has been working in a two-pronged effort: "walking" the database starting with OCLC record #1, and taking daily journal files of newly added and replaced records. There is about a 7 day lag time in processing the journal files. Some questions/comments:

- Users are encouraged to report incorrect merges. All reported errors are examined for cleanup and algorithm correction. Incorrectly merged records can be recovered, along with all associated holdings, for up to 12 months.
- Individual duplicate reports are still welcomed. The need for proof for the merge request will depend on the records in question.
- DDR will even merge records where the language of cataloging is something other than English. The process looks at the 040 subfield \$b, and will merge records only with the same language of cataloging.
- There is no credit for reporting duplicate records.
- There was a case where one library had asked the records to be deleted outright. After a period of time, and new cataloging had been done for variants, they made the request to merge the records. OCLC has very strict requirements for when records can be deleted. In this case, the library should approach the Quality Control Section directly with specifics of the set.

- Discussion on merging records for e-Resources, especially e-books. This is currently being done in conjunction with the change to provider-neutral records. This is similar for records cataloged to CONSER Standard Record specifications, and Google Books/HathiTrust records. Data will be moved to the retained record. There was a concern that the linking fields (776) could get out of synch. There is no solution for this at the present.
- There was a question whether the HathiTrust records could be made available as a WorldCat Collection Set. There is no plan to do so at this time, partly because such a set would be inordinately large and so not necessarily helpful to libraries.

The next topic concerned the recent OCLC-MARC Update, covering MARC 21 Bibliographic, Authority, and Holdings Updates 10 and 11, and reported in *Technical Bulletin 258* (<http://www.oclc.org/support/documentation/worldcat/tb/258/default.htm>). This update added most of the elements needed to support RDA. A new client release will be necessary to complete the update, to add the new fixed field element Form (008/23 and 006/06) to the Computer File format. New codes were necessary to distinguish between direct access and remote access. Client 2.20, released on June 21 provides 64-bit compatibility. Libraries not running 64-bit machines are not required to install this version. The next version, 2.30, will pick up the new Computer File format Fixed Field plus a lot of other cleanup, such as the addition of the new indexes to the drop-down searching boxes, and links to the RDA Toolkit. There was a question about how WorldCat Local will handle the new RDA fields. Jay assured that group that the MARC update specifications have been shared with many different areas within OCLC. There was also a question about the need for indexing the 257 field, Country of Producing Entity. If field 257 is not already on the list of fields to consider for possible future indexing, we will add it and discuss it for a future OCLC-MARC Update.

Discussion turned to the "OCLC Policy Statement on RDA Cataloging in WorldCat for the U.S. Testing Period" (<http://www.oclc.org/us/en/rda/policy.htm>). ***Libraries are strongly urged to become familiar with RDA before they start entering records using its guidelines, especially during its free subscription period through August 31, 2010.*** There is no rush, as AACR2 is still valid. It is anticipated that there will be no widespread adoption until after the U.S. test evaluation, scheduled no sooner than April 2011. There are significant repercussions for implementation (Batchload matching, for example). OCLC will re-evaluate the Policy at the end of the test period. It was suggested that OCLC keep reminding the public about the Policy, using multiple channels.

The Expert Community Experiment ran from February through August, 2009. During that time, around 18,000 corrections were made each month by slightly more than a thousand libraries. Since the end of the experiment the number of institutions has risen to around 1023 libraries per month, with 219,000 replaces since August, or about 22,000 corrections per month. The corresponding decrease in change requests to Quality Control have allowed staff members to focus more on DDR reports of near-matches, monitoring of DDR accuracy, and other DDR-related tasks.

Jay stated that 80 to 90% of Enhance participants also participate in Expert Community changes. One of the most frequently requested changes in the Expert Community is the ability to work on PCC records. Jay expressed the concern that if bibliographic record editing was altered to allow changes to PCC records, this would break the PCC commitment that all headings on a record would be represented by authority work, resulting in a possible dilution of the PCC brand. He then opened the floor for comments:

- Could we mandate that all access points be controlled? Not all Enhance libraries are NACO participants.

- One attendee (both a NACO and a PCC member) expressed strong objection to opening up the editing capabilities. She suggested that maybe a technical solution could allow the descriptive part of the record to be edited, but that heading fields be protected. This wouldn't work if the associated authority record was also wrong.
- Another attendee explained their desire to add newly proposed SACO headings be retroactively added to PCC records to allow display in WorldCat Local.
- Could there be a separate code for hybrid PCC records? How about a code for the specific headings?
- Experience with the bibliographic standard record as a "floor" record may provide insight.
- We rely on the "pcc" coding in field 042 to mean that all access points on a record are valid, and route records into different workflows based on this factor. If "pcc" coding ceases to mean what it has meant, we'd have to redesign all our workflows.
- Could the 042 be removed if a record is touched by a non-PCC library? This would be similar to LC practice.
- Are institutional records an option?
- Could this be tested by another Expert Community Experiment? Could NACO training be provided more widely? BIBCO Coordinator Carolyn Sturtevant of LC reminded the group that PCC is open to new members.
- Have Enhance members lost their mission? Could they make a transition to National Enhance?

Jay closed this portion of the discussion by asking that comments be sent directly to him, or to Enhance@oclc.org. Feedback is highly desired. Some partial solutions may be possible, but will require development.

There was a final question from the floor about the controlling of the 830 fields when a \$x is present. The placement of the full stop results in a validation error. This is a known problem.

Jay closed the meeting with thanks to all those who attended.

Submitted by L. Gabel, OCLC.