

Improving WorldCat Quality

How You Can Participate

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Slide 1 **Improving WorldCat Quality How You Can Participate**

[Introduction by Kay Covert or someone]

Kay talks while slide 1 is displayed. Then we advance to slide 2.

[1:00]

Slide 2 **Improving WorldCat Quality How You Can Participate**

Cynthia: Thank you Kay. Hello, this is Cynthia and I'm happy to add my welcome to Kay's. Ian and I will be trading back and forth throughout this presentation. We'll start with a photo of Ian.

Slide 3 **Ian Fairclough in front of WorldCat in Dublin, Ohio**

Ian: Hello everyone. During my first OCLC Global Council meeting in November 2011 George Needham, who is Vice President for Global and Regional Councils at OCLC, took this photo. Perhaps I look like the custodian of WorldCat! By the end of this webinar I'm sure you'll agree that I do have a great concern for the data stored in these computers as well as in backup facilities around the world.

While I was at Marion Public Library between 2001 and 2008 I attended one of OCLC's distinguished lectures which are open to all those interested. Brenda Block was then manager of Quality Control Section. I visited her and we wound up putting on presentations about editing and reporting records at conferences of the Ohio Library Council. We also prepared two one-day workshops, in 2006.

The OCLC merger with RLIN, together with my being laid off from the Marion Library for financial reasons, caused these workshops to come to an end. After I moved to my present job at George Mason University I spoke with Cynthia a year or so ago and we began to get the ball rolling in the direction that has eventually resulted in today's webinar.

Pretty much anybody listening today could serve in my role. But I took the measures that I have to get involved with improving WorldCat quality, adding data, fixing errors, and sending error reports. So my role today is to give a clarion call to all concerned to get involved and do what's needed to develop WorldCat as a universal bibliographic database rather than just a "utility" from which we get records to use locally. It is our responsibility to get cracking and do the job.

I know that I am preaching to the converted so to speak. My next goal should be, hopefully, to address directors, administrators, heads of technical services in large academic and public libraries, anyone involved with WorldCat, to whatever extent feasible with national libraries in the U.S. and around the world. That's a daunting task. And we speak to that issue to an extent towards the end of the webinar.

I actually have a toehold in that audience with my role in Global Council, which came to me quite as a surprise, particularly in that many of my fellow delegates are in fact directors of major libraries. Not all of them. There's no requirement that you should be. Different types of librarians with differing roles and at various levels of responsibility should serve as delegates to Global Council to give voice to the issues that the whole of Global Council, as well as the Board of Directors and senior OCLC management, who receive Global Council's input, need to hear about. But I'm very glad to have had that role.

My fellow delegates do not in any way act like "You're just a catalog librarian. We needn't take much notice of you." They accepted me on an equal basis. And since it's a role in which any one from an OCLC library can participate, I'll also say this. Please put your name forward to the Global Council nominating committee. If you do, your name might get placed on the ballot. All nominating committees need candidates and it helps them when people volunteer themselves. Please don't think that someone else ought to nominate you, as that might never happen. Simply say "I'm available. You can put me on the ballot if you want." They might do that. And you might even get elected, as I was myself, much to my astonishment.

But don't let my membership on Global Council influence your thinking too much about what I have to say in this webinar. Because I would have said it anyway, and was looking for the opportunity to make this presentation long before I became a Global Council delegate.

Now, over to Cynthia again.

[3:44][5:44]

Slide 4 **Cynthia Whitacre On vacation in Bulgaria in September 2012**

Cynthia: And, here's a recent photo of me. This photo was taken right outside the library of the Rila Monastery in Bulgaria. The Rila Monastery is a UNESCO World Heritage site; it was founded about 1100 years ago. I've been an OCLC staff member for 25 years and enjoy travel during vacations to interesting places. I try to include libraries and cultural heritage sites in my travels. Prior to coming to OCLC I was a librarian working in both academic and special libraries. I've also been active in the American Library Association and served as President of ALCTS, the Association for Library Collections and Technical Services, which is a division of ALA, in 2010/2011. But, enough about us.....

[0:50][6:34]

Slide 5 **OCLC is:**

Ian: Now for some comments on what OCLC is. OCLC now stands for Online Computer Library Center. As you know it had its origins as the Ohio College Library Center. And is still to this day headquartered in Ohio. It is a membership organization. In discussion at Global Council and elsewhere

nowadays there is considerable concern about what type of an organization OCLC is. Whether it is for example a vendor, whether it is a monopoly, whether it is in competition with other agencies, whether it is a nonprofit organization as in the United States, or since it cannot be a nonprofit organization elsewhere in the world, what status it has in those countries. Matters like that are all being discussed.

[0:45][7:19]

Slide 6 **OCLC Members**

Ian: But one thing is for sure. OCLC is a membership organization. And you people listening to us are representatives in a sense of the membership, the membership being individual libraries, museums, archives, and other similar agencies that are members of OCLC.

Cynthia: There is no such thing as a PERSONAL membership of OCLC, unless a particular individual is also the entire staff of a particular agency. So Ian for example cannot claim to be an OCLC member, although George Mason University where he works is a member.

[0:35][7:54]

Slide 7 **Communication with OCLC**

Ian: One concern is, who at any particular library may communicate with OCLC staff. Some agencies might require just one person from whom everything that is to go to OCLC headquarters must be sent. That is understandable when you consider issues such as negotiating the contract. You don't have to be a genius to figure out that you don't want more than one person working on such matters. And therefore an agency might require that there just be one contact person for that.

But for the work we are addressing today, contact between a member agency and OCLC quality control staff should take place directly. If you have an issue to communicate to OCLC quality control, you should not have to refer it to another person. Anybody who has an issue of the type that we're discussing today should be allowed to communicate without having to go through a local intermediary. We'll say more about that later on.

[0:45][8:39]

Slide 8 **OCLC Staff - Member Relationship**

Cynthia: Ian and I are working on this together. I'm an OCLC staff person. Ian works at an OCLC member library. And we work together ... we want to make WorldCat quality better. That's our goal. And we want to enlist your help in that, because it's a responsibility of all OCLC cataloging members to maintain the quality of WorldCat. So, we've worked on this together.

Ian: Now, when it says "What Ian says might differ from official policy" that might be reflected a little bit in the fact that I will tell you certain things that

you *should* do perhaps, whereas in a strict technical sense Cynthia might tell you things that you *can* do. That will be about enough for now.

[0:48] [9:27]

Slide 9 **Editing Master Records [1st slide]**

Cynthia: The aim of this Webinar is to encourage each of you to improve master records in WorldCat for use of all the members. We want you to edit master records whenever possible to enrich and/or update bibliographic records OR to report errors to OCLC staff if you cannot correct them yourself. We'll also discuss parallel records and hybrid records.

[0:28] [9:55]

Slide 10 **Editing Master Records [2nd slide]**

Cynthia: The technical details shown on this slide talk a little bit about what you need to do in order to do this work. You need to lock the record when you are in Connexion Browser. You don't need to do that if you're in Connexion Client. Then after locking the record, or just being on the record in the Client, you perform the edits that you want retained in the master record. And then you do the replace command, to replace the master record. Any changes you've made then stay with the master record. So you're permanently improving the master record.

After you have replaced the master record, then you want to perform your local edits, and do the things that you need to do to produce or update the record for your local situation.

[0:45] [10:40]

Slide 11 **Editing Master Records – Examples**

Ian: Getting now into what you can actually do to an OCLC master record by way of improving it. You can correct typographical errors whenever you see them. The one thing you have to be concerned about is that the typo is not a *replication of an actual error* in the source materials. In other words, if they misspell a word in the source, you don't correct it in your record.

Other than that, you can correct typographical errors in most parts of most bibliographic records in WorldCat.

Adding call numbers. Now if you work with Dewey, but the record that you're working with has only a Library of Congress classification number, or some other scheme, or no number at all, you can add a Dewey classification number into the record. Getting the number right is of course *your* concern. The fact is, that if you've done the work and add the number, then you have improved the quality of WorldCat. Do not be excessively concerned about how good you are as a classifier. Chances are, you'll do a just fine job, and others can benefit.

Similarly with subject headings. You might find for example that you encounter a record cataloged by the National Library of Medicine. They apply their own scheme of subject headings, MeSH, with second indicator two. They do not apply Library of Congress subject headings. You can add an LCSH heading to that record and then replace the master record to retain it.

Cynthia: What we do not want you to do is change the coding of existing subject headings to make them LC subject headings, even though in some cases the actual words in the heading may be identical. If you did change them, other agencies that do use MeSH will then no longer have their required heading in the master record. Always *add* subject headings in other schemes. Don't edit them or delete existing subject headings unless they are incorrect.

Ian: Similarly with UPC codes, or EAN codes. These often occur with audiovisual materials. They are very helpful because you can use the barcode number to retrieve the record. And if the number isn't present, so that you had to use a different search technique to retrieve the record, then once you've added the number someone else can simply scan the barcode. You'll have saved them the task that you had to do yourself, of physically having to either type out that number or do a different search.

Later on we'll cover issues about amplifying CIP data, and this business about contents notes.
[2:26] [13:06]

Slide 12 **Reporting Duplicate Records**

Cynthia: ... Reporting duplicate records is really helpful to the membership. WorldCat is a master record database. That means only one record per language of cataloging to represent a particular manifestation (to use FRBR terminology). Duplicates have been identified in many surveys as the number one quality issue for WorldCat. Duplicate records that are in the database that represent the same manifestation are errors. And so we'd love to have you report those, because OCLC staff want to merge them. Staff members in OCLC's WorldCat Quality Management division manually merged 166,000 plus sets of duplicates in the last fiscal year. And, the latest statistics from DDR, the automated merging program, merged 712,000 sets of duplicates in the past 6 months (eliminating 817,000 duplicates)

So, how can you tell if two records qualify as duplicates? We have a lot of information about that. You'll find it in "When to Input a New Record" in *Bibliographic Formats and Standards Chapter 4*. So please report duplicates.

The note about CIP records is just a reminder that some duplicates get into WorldCat because the date of publication is different than what was projected on the CIP and if careful searching is not done, the record may not be found.

So, please, report any CIP records with different dates as duplicate for possible merging.

[1:25] [14:31]

Slide 13 **Examples of Duplicates**

Cynthia: Here are some typical duplicates that are found in WorldCat. The majority of duplicates do get added by batchload, since the machine algorithms are not sophisticated enough yet to make the decision that these are the same things, given the highlighted differences, even though a human being can spot these right away as duplicates. That's why it is so important for you to report these.

[0:25][14:56]

Slide 14 **Working with Parallel Records [1st slide]**

Ian: The introduction of parallel records within the OCLC database took place within the past ten years or so. It was a major cultural change, you might say, for OCLC because it was the introduction of the concept that there might be, in certain circumstances, more than one record representing the same entity. The difference being that in one record the language that the cataloger used to do such things as describe note fields and put in summaries and contents would be English, whereas another cataloger working in an agency in a different country such as Germany or Spain would use their own language to provide those bibliographic note fields.

Also field 300, the physical description, which of course is highly abbreviated, so you can't very easily tell but you can actually tell if you look closely, might be representing a different language. For example, we have many records with the abbreviation p period for pages. Whereas German and other Germanic languages use the letter S for the German-language word to represent pages.

Now, when you find a record that matches the kind of description I just gave you, check in field 040 and see if subfield b is present. If subfield b is *not* present then the language is, hopefully, English, and you can if you wish add subfield b eng for English-language cataloging. You don't *have* to, it's not *required*. But that's the assumption, that if no subfield b is present it's an English-language record. And if those note fields or the physical description are in a different language, then you have a situation where there is variance between those fields and the 040 subfield b. And you can resolve that by adding in a code to represent the language of cataloging.

[2:00] [16:56]

Slide 15 **Working with Parallel Records [2nd slide]**

Cynthia: ... When you encounter a record where the language of descriptive cataloging is other than English, if your cataloging language is English, you have a choice as to whether you want to use it for copy cataloging or not. OCLC policy lets you make your own decision at your local library. Best

practice is for you to use and add your holdings only to records in your own language of cataloging. You're welcome to add a parallel record in your language of cataloging. For example if the only record in WorldCat is a German record, feel free to add an English-language record into WorldCat for the same manifestation, the same book, the same title.

Ian: And we have one important caveat here, which is that if you do decide to go with the existing record, and change it so that it's all in English, *please* don't replace that record. That would be a violation of the language of cataloging of the original agency. It would *not* improve the bibliographic universe if you were to do that.

[1:06] [18:02]

Slide 16 **Working with Hybrid Records [1st slide]**

Cynthia: Unfortunately, there are bibliographic records in WorldCat which are hybrid, meaning that some of the description is in one language and some of the description is in another language. When this is the case, and you want to use the record, there are 2 clear options. You can edit the record so that it is only one language of cataloging and make sure that it is what is noted in 040 \$b. OR, you can report it to Quality Control as an error and let OCLC staff decide how to clean up the record. The 300 field is where you will often be able to tell the record is cataloged using a language other than English, since the abbreviations there will be different than the standard English ones, such as S. for Seiten instead of p. for pages.

[0:50] [18:52]

Slide 17 **Working with Hybrid Records [2nd slide]**

Cynthia: There is more information on hybrid records for language of cataloging in BFAS as noted on this slide.

Ian: Now this is one point on which I disagree with official OCLC policy. My view is that bibliographic records should have subject headings in only the language that is the language of cataloging. Several years ago the decision was made to add in subject analysis in schemes other than LCSH and English-language schemes. This has resulted in the *appearance* of a hybrid situation, which technically in OCLC terminology is *not* a hybrid situation. Because it is permissible for these other-language subject headings to be present in the record.

My disagreement is this. With the introduction of parallel records the inclusion of other-language subject headings should not take place. Rather, parallel records should be created for the subject headings in the other languages. And those other-language records should be coded as such, even when description portions such as the 500 notes are still in English. It then would be up to agencies in the other-language community to update and edit the descriptive portion to their own language.

Well, OCLC and its members can argue about this. But my purpose today is not to politicize on behalf of this particular technical opportunity. But rather to draw your attention to the fact that OCLC policy *does* permit these other-language subject headings. And it is *not* appropriate to remove them. Nor is it advisable to attempt to make any edits to them, even if you are aware of any discrepancies in the other-language headings.

Cynthia: And so this is a point on which Ian and I will differ. Now *you* must follow OCLC policy with respect to these other language subject headings. What that means for practical purposes, when you discover errors to be corrected or other additions to be made such as LCSH headings, in a record which *has* foreign language headings -- Edit and replace the master record first. Then and only then, delete other language subject headings for local purposes.

[2:30] [21:22]

Slide 18: **Hybrid Record -- Example**

Ian: This is an example of a hybrid record that actually came to my desk recently. The master record contained the language of cataloging in field 040b as eng. However there is a 500 note in a different language, which as it turned out is Afrikaans. Afrikaans is quite similar to Dutch, but Google Translate, which is a very useful tool, did not translate all the words from Dutch but instead translated correctly from Afrikaans.

What not to do, is change the 500 note to English. What was appropriate to do was change the 040b to the code for Afrikaans. Now, if you don't have the confidence that you're correct to do that, as I did not in this case, you can report the situation to OCLC staff. If you *do* have that confidence then you can simply change the 040 and create a new record, a parallel record, using your own language of cataloging.

[1:08] [22:30]

Slide 19 **Working with Electronic Resources**

Cynthia: One of the big topics for libraries these days is how to handle bibliographic records most effectively for electronic resources. Aggregator-neutral or provider-neutral records were introduced in the 1st decade of this century, so that you didn't need multiple records in your catalog for every single provider of an electronic resource. As you know, many electronic serials and many e-books now are available from multiple providers. In other words, the same content is available from many different sources at many different electronic addresses or URLs.

You don't need an individual record for each provider if you don't want one. OCLC has adopted the provider-neutral approach both for serials and for e-books. We are striving to have provider-neutral records be the norm in

WorldCat for e-resources. Please report individual records that you find for different providers as duplicate records, and we will merge them and make the records provider-neutral.

If you decide you want multiple records (one for each provider) in your local catalog, that is fine. However, WorldCat is officially provider neutral.

[1:23] [23:53]

Slide 20 **Working with CIP: Cataloging-in-Publication**

Ian: Working with Cataloging-in-Publication has been a bugbear for catalogers over many years. The fact is, that CIP records are abundant. Many of you will find not only a CIP record, but also a fully cataloged record for the same entity. In which case, that should be reported as a duplicate. Now, there are various ways in which CIP records might be identified using the ELvl: code. If it's an eight then it really is official Cataloging-in-Publication, and you should see that on the title page verso or wherever else the information is actually printed.

Cynthia: There are other comparable records, comparable in the sense that they share the same problems. These are called Pre-Publication Records. They will most likely have encoding level of M for minimal level batchload or perhaps level 3. Sometimes this cataloging is very good quality and sometimes it is definitely inadequate. These records originate with agencies that do contract cataloging on behalf of publishers or agencies that are trying to sell titles prior to publication. Often this cataloging is done using data sheets or electronic galleys from a publisher stating what they plan to publish. Sometimes it is strictly machine-derived from a publisher feed. When the actual publication comes out, it differs in the finished version. I'm sure you're familiar with such situations.

Ian: The point is that OCLC member agencies *can* upgrade such records. You certainly should do so rather than create a new original record. I know it's a pain, to have to work with what looks like such inadequate cataloging. Many of which will have been machine-derived in the first instance.

Cynthia: Please don't view pre-publication data as absolute truth. It can often change. The publisher changes the title of the book. It comes out in a different year. An author may change their name or the form of their name. Sometimes a different author entirely is assigned to write the book than person who was going to write it at the time that the pre-publication cataloging data was prepared. And sometimes the book can even wind up being about a different subject, or requiring different subject headings than before. And, forms of headings may need to be changed since a NACO agency might have changed a heading in the meantime. For example an unqualified personal name might now have qualifiers in the heading.

Ian: In all of these cases, you can upgrade the pre-publication records and if your library is not a NACO library, you can report changes needed in authority records to OCLC. If you're a NACO member you will want to report or make changes via NACO channels.

[2:13] [26:06]

Slide 21: **CIP Upgrade Example: Before & After**

Cynthia: Here's a typical example of a CIP upgrade, where the date of publication changes, the 300 field for physical description is filled in, the pages for the bibliography are supplied, and the 263 field is deleted.

[0:15][26:21]

Slide 22 **Who can make changes to records?**

Cynthia: So once you've determined that a change needs to be made to a record, who can make that change? Anybody who has a full level cataloging authorization can make changes to the master records. When OCLC introduced the Expert Community in 2009, cataloging staff in member libraries were empowered to make changes to almost every bibliographic record. You don't need approval. We often get asked "Do I need to be approved, or go through some vetting process here at OCLC?" And no, you do not. Once you have the full level cataloging autho, you are empowered to make changes to full level records. You are part of the Expert Community. You don't need to report those changes to OCLC's Quality Control Section. Please consult OCLC documentation and check your local policy before you take any action on master records. But feel free to go ahead and make changes that you are confident are correct.

The biggest rule is, Do no harm. And so please try to keep that in mind as you make changes and work within the WorldCat database.

Ian: And also, in saying "Do no harm," we also have a concern that you should do no harm to yourself, as a staff person. If your supervisor has told you not to make changes to OCLC records, or not to report, don't do it. We don't want you to lose your job over this.

[1:20] [27:41]

Slide 23 **What If I Can't Make Changes to a Record? [1st slide]**

Cynthia: PCC records are the major exception to allowing everyone to edit master records. The reason for this is that PCC records must, by definition, be backed up with authority records for each access point. So, PCC records may be edited by anyone with a NACO authorization or national level enhance authorization. In addition, database enrichment, or adding certain fields to records is allowed on PCC records.

Ian: You can tell whether a record is PCC or not by the presence of field 042. Now in the case of the National Library of Medicine, they do not use field 300c

to indicate the height of a book. They do not add subject headings or classification numbers other than their own. Those are data elements that you *can* add in to a master record, even if you do not yourself work at a PCC agency.

However, another thing NLM routinely does is add field 020 for ISBN numbers that represent the electronic version of a print publication. Such 020 fields are supposed to have subfield z to indicate that it's not found on that particular publication. NLM does not include subfield z. Unless you are a PCC member you cannot add subfield z to the master record. But you can report it to OCLC quality control.

[1:23] [29:04]

Slide 24 **What If I Can't Make Changes to a Record? [2nd slide]**

Ian: Now this slide here, you have an actual example of a complete OCLC master record to look at. This is the NLM record I was referring to on the previous slide. And of course you can't read it because it won't fit! But never mind, on the next slide we'll have the data elements that are of concern in a format that will be more legible.

[0:13] [29:17]

Slide 25 **Changes You Can Make And Those That You Can't**

Ian: As you can see, in cases such as this one here, there are both aspects of editing and of reporting to be considered. We hope that you won't find this too complicated. If it is, simply do the one or the other, either just fix things yourself, or just report to OCLC. And if you don't know which one to do, just send a report. If you do report it, OCLC Quality Control staff can fix it. If you don't, they won't even know there's a problem.

[0:25] [29:42]

Slide 26 **Changes You Can Make: Database Enrichment**

Cynthia: Here are some of the other things that you can add to a record, if the data is lacking. Please note that we're providing examples here, and not a comprehensive list. I encourage you to add data to records. While you are editing records for your local needs, please add info to the master record as well, because the work you put in will benefit everybody in the OCLC cooperative.

Ian: And furthermore, if for example you see a contents note, and you don't particularly like what was done. You think perhaps that it could have been better formatted. Or a summary that you might think is either too verbose or not sufficiently descriptive. You can edit, as well as adding those fields.

Cynthia: For series, when LC implemented their "series decision" of not tracing series, OCLC made it possible for you to change that decision in any LC record that you wish to do that in. So you can add a series tracing - or series

added entry --- perhaps we shouldn't use the word *tracing* because that's old terminology!

Ian: And so is *entry*, is becoming old as well, nowadays with the implementation of RDA.

Cynthia: Access point. So you could add an *authorized series access* point in an 8XX field to any record that has a 490. And that's particularly useful to the rest of the world that wants to continue maintaining series.

Ian: And you can in many cases consult a series authority record to determine what the appropriate treatment might be. However, you might also be advised that, unlike name authority records, where you really *should* use the heading that's given as the established heading for that person or corporate body: with series, just because the series data for tracing tells you that this field *is* traced, doesn't mean that you're *obliged* to trace it locally. The decisions are often left to the local agency. Though you may wish to insure that you have a consistent *local* policy.

[1:52] [31:34]

Slide 27 **Adding Data to a Non-PCC Record**

Cynthia: For non-PCC records, which are the majority of the records in WorldCat, you are free to edit and add fields as you wish.

Ian: One technique that you can use in doing this kind of copy-and-paste from one source to another is to open a Word document, copy from a Connexion record data that you may wish to use elsewhere, paste it into the Word document, and from there you can later on lift the data and put it back into a bibliographic record in Connexion.

[0:37][32:11]

Slide 28 **Technique for Adding Data**

Cynthia: In addition to just typing the information into the bibliographic record, when you've got it displayed on the Connexion screen, you can copy and paste information from other sources. Contents notes and summaries might be the things that would be most likely taken from another source, such as a related record. For example: You could copy the summary note from the record for an electronic version and use it on the record for the print version.

Ian: This workshop deals exclusively with handling bibliographic records in WorldCat. Many WorldCat records originate with the Library of Congress. It's advisable to contact the Library of Congress directly about errors in their own bibliographic records. However, before doing so consult the Library of Congress's own catalog. Records in WorldCat can be edited by other agencies. Those agencies can introduce erroneous situations. The Library of Congress is

not concerned with such errors in WorldCat. They are concerned solely with their own records.

Furthermore, records in the Library of Congress catalog that are still in process should not be reported to them, because Library of Congress staff will likely find and correct those errors themselves. If they do not, then by all means report to them directly. They wish to hear from you, and have set up channels of communication by which you can contact them.

[1:25][33:36]

Slide 29 **Reporting Directly from Connexion**

Ian: When you have a bibliographic record displayed on the screen: if you notice an error that needs to be reported to OCLC: in other words, it's not one that you can correct yourself, you can report that error directly from the screen itself. You can go to the "report error" functionality from the "Action" menu. Click on "Action" and select "Report error" from the box that's displayed. And then a pop-up box will appear. And you can enter your OCLC symbol, your name and e-mail address if you want to receive a copy of the report that you made. Then in the free-text box, you write what the problem is. You don't need to go into very great detail. For example if you have a case of duplicate records, just putting "dups" and the two ID numbers, or even just the ID number of the other record, the one that's not displayed, that's all that's required. And click on the "report error" button. And off goes the message. And you will get an e-mail back if you requested one.

And even if your report isn't as "on the mark" as you wish it were, nevertheless the fact that you've sent the report will prompt an OCLC quality control person who is receiving the report to investigate the situation and see if something can be done. And don't worry about whether or not it's too complex for them to address. *They* will make that decision and then act accordingly.

[2:00][35:36]

Slide 30 **Other Methods of Reporting Errors to OCLC**

Cynthia: In addition to the reporting from Connexion which Ian just described, you can also send an e-mail directly to bibchange@oclc.org, if you have something you just want to write in a free-text e-mail. And in fact, that's the same address to which the errors that you've reported through Connexion go to. So this all goes into the same mailbox at OCLC.

We also have forms on the OCLC website that you can use. We have a fax number to fax things to, if you want to provide proof for something, and need to send a copy of the title page for example. Or you can put things together in a paper mail packet and mail it. All the information on how to do this, including our address and the fax number, and links to the web forms, are all found in the link in chapter 5 of *Bibliographic Formats and Standards*, which is noted here.

Ian: Don't feel obliged to try and copy down that entire URL while we're on the screen here. You can get that from us afterwards. We'll be sending the slides to anyone who wants them.

[0:54] [36:30]

Slide 31 **Questions to Ask Yourself [1st slide]**

Cynthia: The next few slides will show you how you can approach the issue of deciding whether or not you are going to participate in the work that this webinar is about, improving the quality of WorldCat master records.

Ian: When you have a record displayed in front of you, the first question to ask yourself is, "Is there something that I can do to improve this record?" And we have already covered some of the several ways that people may be able to do so. Whether it's with an additional call number, or subject headings, or an ISBN, take a look over the record and say to yourself "Is there something I can do?" And if the answer is yes, then please do.

Cynthia: Second question. "Is it worthwhile to spend my time on this?" This question is one of the most debated ones in the whole issue of error handling in bibliographic databases. One question that I often ask people is, "Is it going to improve access for other catalogers and for end users?" In other words, if you are improving a record, and then an end user finds that record and the materials they need as a result of your work, then it is definitely worthwhile. Likewise, you are saving time for your cataloger colleagues who don't have to make the same improvements again.

Ian: Furthermore, please bear in mind one of my favorite characters. The thirteen-year-old who has been told by his teacher that his spelling is wrong. He then discovers that there's a spelling mistake in a bibliographic record. Guess what he is! Confused. It's a part of the educational value of the catalog to spend time on improving the quality of the database.

Cynthia: Whether or not it's *economically* worthwhile, that is another issue. I would say it is, since you are doing it at web scale, and improving the record for all users of WorldCat. But, we are not going to address economics in this workshop.

Ian: Third question. "Will my additions, changes, benefit other libraries?" Yes they will. The next person who comes along will see an improved record. They won't be confronted with the question whether or not they need to add a subject heading, or add a call number. You will have already done that for them.

Cynthia: Number four. If you do discover you've done something to a record that you later think twice about, or wish perhaps you hadn't done it, you

certainly can always go back later and change it to something else, or just get rid of whatever you have done. Hopefully you will have made careful decisions before you started editing the record. But if you discover that you've introduced a typo into the record, you can go back and correct that typo.

Ian: And I had a case recently where I sent OCLC a report that said "oops, I replaced master by mistake - please revert to previous version." It's quite OK for you to send a message like that to OCLC. You're not going to get into trouble over it.

Cynthia: Fifth question. This is probably the one that goes through most people's minds as they with trepidation wonder whether they can do something to a bibliographic record to make it better. Will they actually, in the course of trying to make it better, do more harm than good? Here's our answer to that question.

[2:38] [39:08]

Slide 32 **Questions to Ask Yourself [2nd slide]**

[STOP]

Ian: We hope that this little symbol will answer the last question. We don't want you even to think about whether you will do harm to the record. The reason why, is that it is most unlikely that you will. And in all probability, you will be improving the record. Please, if you think that you will be improving the record, or *might* be improving the record, or *just* might improve it, you probably are doing people a great favor.

[0:21] [39:29]

Slide 33 **Questions to Ask Your Supervisor**

Ian: In the last few minutes of this presentation we want to address some of the questions that you might wish to take up with a supervisor before participating in the project. We don't want anybody listening to our webinar, or for that matter anybody else in the world, to get into any kind of trouble because they're doing something that their supervisor thinks or says that they *should* not do, or stronger, *must* not do. That is between you and your supervisor. So what we recommend is that, if you haven't already, that you have some kind of a conversation, discussion, e-mail exchange, with anybody who is in a supervisory hierarchical relationship to you, who has authority over the work that you do. To insure that any actions you take with respect to editing or reporting WorldCat records are understood completely and in accordance with local practices.

Cynthia: A general question you may ask is, "May we improve WorldCat quality?" The answer of course is yes, but not just yes: more to the point, we *must* improve WorldCat quality, "we" in this context referring to the entire membership of the OCLC cooperative. Why? Because we must prepare for the *future* of WorldCat. WorldCat is already a bibliographic database "in the

cloud", with WorldCat local as well as with WorldCat dot org. Those are the terms in which we need to think. Not in terms of individual local automated library systems, which are a twentieth-century technology, but in terms of what benefits the bibliographic database at webscale for the 21st century.

Ian: We'll move on from that to "Can we implement record improvement as part of our procedures?" In many cases you have established procedures for what to do when cataloging. You go through steps one by one. If record improvement is not part of those procedures, you may wish to implement it by adding some steps. We can advise on how to adjust local procedures in appropriate manners.

Cynthia: Question number three, "What training is needed for correcting records?" As a cataloger, you already have the training that you need. You know how to identify appropriate bibliographic matches. You already look for words that might be misspelled, typographical errors, and things that are omitted. The only difference is that instead of simply applying those techniques to your local cataloging, you will be applying them to the WorldCat database and benefitting other users in the process.

Ian: "How can we optimize our use of our time?" You *are* optimizing it by participating in these projects because, the more people do participate, the more likely it is that when you encounter a bibliographic record, somebody else will already have done the work that otherwise you yourself are going to have to duplicate. And of course, duplication of effort is entirely contrary to the spirit of cooperation. It's contrary to the spirit in which OCLC was founded initially back in the 1960s.

Cynthia: "How can we benefit from the work of other libraries?" Like Ian just said, other libraries participating in quality control work in WorldCat will improve records before you get to see them. That typo that was there when a person at another library saw it, is no longer there because that person has fixed it.

[3:14][42:43]

slide 34 **Questions to Ask Your Director**

Cynthia: ... Perhaps this first question is something your entire cataloging department might want to discuss and then take up with your library director. Can you perhaps work with other libraries to form an alliance, so that you can work together on WorldCat quality? Perhaps you might want to concentrate on upgrading musical score records and somebody else might want to concentrate on upgrading AV records within your local consortium. That would be a way you could benefit each other and mutually optimize your time. And then, thinking further, what do you think might need to be added or changed about your job descriptions, so that you know that contribution to WorldCat quality is something that is encouraged as part of your work.

Ian: Once a record gets into WorldCat it becomes the property of OCLC. But OCLC in this context does not mean the administrative offices in Dublin Ohio. OCLC staff and executives. It means OCLC the cooperative. It means us, all OCLC members.

[1:00][43:43]

slide 35 **Further Detailed Training**

Cynthia: Please note the FREE training OCLC offers through the training portal. My training colleagues tell me that we are in the process of adding February and March classes to the training portal, and they'll be listed within a short time. Both the browser and client classes are scheduled in February, and the browser class is also scheduled in March.

The classes noted here cover how to report errors, as well as more detail on the what and why in the class. There is also a quiz that gives learners practice in identifying records that can be replaced under minimal-level upgrade, database enrichment, and Expert Community.

[0:32] [44:15]

slide 36 **OCLC Quality Control Section**

Cynthia: I'd like you to meet the Quality Control section, which is part of my department here at OCLC. In this photo, from left to right, we have Robin, Patty, Shanna, Laura, Hisako, and Charlene. Many of you may remember Brenda Block as the QC Section manager. She retired this past July, and Laura Ramsey is now the manager of the Quality Control Section. Laura is the 3rd from the right in the photo. These are the folks who receive the error reports and requests you send to the bibchange address.

[0:30] [44:45]

slide 37 **Questions?**

Cynthia: We welcome your questions.

In closing after questions:

Ian: Is there someone out there who is particularly helpful in sending lots of reports, so that Quality Control Staff can really improve WorldCat as a result?

Cynthia: That would be you Ian.

Ian: Is there anyone who is a particular nuisance in sending so many reports that Quality Control Staff are constantly being bothered by having all sorts of situations to attend to?

Cynthia: That would be you Ian.

Ian: I'm sure you all get it. You can't do this work without being both helpful and a nuisance. So relieve yourself of any feeling of anxiety - and make sure your supervisor gets over it too - and send in those reports.

Cynthia: We look forward to receiving them.

Ian: On behalf of the OCLC Cooperative and all members--

Cynthia: And on behalf of OCLC quality management staff

Ian and Cynthia: Goodbye everyone and thanks for attending.