Improving WorldCat Quality
How You Can Participate
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Ian Fairclough in front of WorldCat in Dublin, Ohio
Cynthia Whitacre
On vacation in Bulgaria: September 2012
OCLC is:

- Online Computer Library Center
- A membership organization
- The members constitute “OCLC”
- Headquarters in Dublin, Ohio
- An international body
- A non-profit corporation in the United States
OCLC Members

- Institutions such as: libraries, museums, archives
- Individual people work at OCLC member institutions
- Individuals are not personal members of OCLC
- Institutions can be represented by just one person (director, or delegate) or multiple people
Communication with OCLC

- For local reasons some libraries require all correspondence with OCLC staff be done by just one person.
- Communication/contact with OCLC staff can be dispersed among many library staff members.
- Error handling is a case where a more diverse approach works well.
OCLC Staff – Member Relationship

- Exemplified in this webinar
- Cynthia represents OCLC staff
- Cynthia will do her best to reflect official OCLC policy
- Ian represents OCLC members
- What Ian says might differ from official policy!
Editing Master Records

- Editing master records
  - enriching content
  - correcting errors
  - Editing incomplete (less than full) records
- Reporting master records
  - errors you cannot technically correct
  - duplicate records
- Parallel records
- Hybrid records (descriptive cataloging in more than one language)
Editing Master Records

- In Connexion Browser, “Lock” record
  - This lock step is not necessary in Connexion Client
- Perform edits to be retained in master
- Replace master record
- Perform local edits
- Take final actions (produce, update, export)
Correct obvious typographical errors
Add call number in your classification scheme
Add subject headings
Add UPC/EAN (Field 024)
Amplify data for Cataloging–in–Publication records
Copy–and–paste contents notes and summary notes from an electronic–format record to a print–format record.
Reporting Duplicate Records

- Duplicate records are “errors”
- How can I tell if two records qualify as duplicates?
- If in question, consult “When to Input a New Record” in *Bibliographic Formats and Standards* Chapter 4
- Dates of CIP records can be incorrect
- If in doubt, report!
Examples of Duplicates:

OCLC#814529414  (DLC record -- only selected fields shown in this example)
020    9780071714075  (alk. paper)
100 1    Rittenhouse, L. J.
245 10 Investing between the lines: ¶b how to make smarter decisions by decoding CEO communications / ¶c L.J. Rittenhouse.
264 1 New York: ¶b McGraw-Hill, ¶c [2013].
264 4 ©2013
300 xi, 291 pages: ¶b illustrations; ¶c 24 cm

OCLC#815755500  (Batchloaded record from a member library)
020    9780071714075
100 1    Rittenhouse, Laura.
245 00 Investing Between the Lines.
300 240 p.

OCLC#713224433  (Batchloaded record from a vendor)
020    9780071714075
100 1    L. J. Rittenhouse.
245 10 Investing between the lines.
260 [S.I.]: ¶b Mcgraw-Hill Professional, ¶c 2012.  (no 300 field)
Working with Parallel Records

- Check field 040 $b$ for language code
- If no 040 $b$ is present, language of cataloging should be English
- You can add 040 $b$ when language of cataloging is not English
- You may also add 040 $b$ for English (eng) when appropriate
- Example: If note fields are in Spanish, code 040 $b$ spa
Working with Parallel Records

- Sometimes the only record available has another language of cataloging.
- OCLC policy permits you to use any master record for local cataloging, regardless of language of cataloging.
- Parallel records are not duplicates.
- Best practice is to use only records in your language of cataloging. If none exists, you can derive a new record in your language of cataloging.
Working with Hybrid Records

- Sometimes a record has apparently been cataloged using more than one language for description.
- For example: Field 300a has “S.” instead of “p.” whereas field 500 is in English.
- Such records are hybrid situations.
You can report or fix hybrid situations

Consult *Bibliographic Formats and Standards* Chapter 3 for further guidance

NOTE: Subject headings can be in other languages than the language of cataloging and are not “Hybrid” situations
Hybrid Record– Example

- OCLC 90882523
- Language of cataloging was: eng
- Record contains 500 note in Afrikaans
- DON’T change 500 to English
- CHANGE 040 △b to appropriate code: afr
- If you don’t have the confidence that you are correct, you can report
- You can also create a PARALLEL master record with 040 △b eng
Working with Electronic Resources

- Aggregator–neutral (Provider–neutral) records
- Became the standard in the last decade
- Individual records for each provider are no longer best practice
- You will often still find individual or multiple records
- Report these as duplicates: OCLC can merge them into provider–neutral records
Working with CIP: Cataloging–in–Publication

- CIP records abound in WorldCat
- Official CIP are identifiable by ELvl: 8
- Pre-publication records from sources other than national libraries may have ELvl: 3, M, or K
- Members can upgrade such records
- Pre-publication data can change by time of publication (title, date, author, even subject!)
- Established name headings can change
- Report changes needed in authority records to OCLC  
  \( \text{Note: NACO members: report authority changes via NACO channels} \)
CIP Upgrade Example: Before & After

Before:

050 00 HG4521 ‡b .R584 2012
082 00 332.6 ‡2 23
100 1 Rittenhouse, L. J.
245 10 Investing between the lines : ‡b how to make smarter decisions by decoding CEO communications / ‡c L.J. Rittenhouse.
263 1211
264 1 New York : ‡b McGraw–Hill, ‡c 2012.
264 4 ©2013
300 pages cm
336 text ‡2 rdacontent
337 unmediated ‡2 rdamedia
338 volume ‡2 rdacarrier
504 Includes bibliographical references and index.

After:

050 00 HG4521 ‡b .R584 2013
082 00 332.6 ‡2 23
100 1 Rittenhouse, L. J.
245 10 Investing between the lines : ‡b how to make smarter decisions by decoding CEO communications / ‡c L.J. Rittenhouse.
264 1 New York : ‡b McGraw–Hill, ‡c [2013].
264 4 ©2013
300 xi, 291 pages : ‡b illustrations ; ‡c 24 cm
336 text ‡2 rdacontent
337 unmediated ‡2 rdamedia
338 volume ‡2 rdacarrier
504 Includes bibliographical references (pages 275–282) and index.
Who Can Make Changes to Records?

- Only qualification is having a full level cataloging authorization
- With Expert Community, cataloging staff in OCLC member libraries are empowered to make changes to almost all bibliographic records
- No approval necessary from OCLC or any other agency
- No need to report routine changes/upgrades to OCLC’s Quality Control Section
- Consult OCLC documentation and check locally, as appropriate, before taking action
Sometimes Connexion will not permit you to edit a master record

Database enrichment might be permitted, but not other changes

A case in point is PCC records, which cannot be further edited by non-PCC members

An example is from NLM:
- You can add the height (300c)
- You can add classification and subjects
- You *cannot* add subfield z in field 020
What If I Can’t Make Changes to A Record?

OCLC: 773431439
008 120112s2012 gw a b 001 0 eng ¶
040 NLM =b eng =c NLM =d UKMGB =d DEBBG =d BDX =d YDXCP =d OHX =d CDX =d OCLCO =d BWX =d OCLCO ¶
020 9783527329663 (hbk.) ¶
020 3527329668 (hbk.) ¶
020 9783527645947 (oBook) ¶
020 3527645942 (oBook) ¶
028 52 Best.-Nr.: 1132966 000 ¶
042 pcc ¶
060 00 W1 =b ME9613H v.53 2012 ¶
060 10 QU 55 ¶
072 7 QP =2 lcco ¶
082 04 615.19 =2 23 ¶
245 00 Protein–ligand interactions / =c edited by Holger Gohlke. ¶
260 Weinheim : =b Wiley–VCH, =c c2012. ¶
300 xx, 339 p. : =b ill. ¶
490 1 Methods and principles in medicinal chemistry ; =v v. 53 ¶
504 Includes bibliographical references and index. ¶
650 12 Ligands. ¶
650 12 Proteins =x pharmacokinetics. ¶
650 22 Chemistry Techniques, Analytical =x methods. ¶
650 22 Protein Binding. ¶
650 07 Ligand (Biochemie) =0 (DE–588)4606532–5 =2 gnd ¶
650 07 Proteine. =0 (DE–588)4076388–2 =2 gnd ¶
650 07 Wechselwirkung. =0 (DE–588)4064937–4 =2 gnd ¶
655 4 Aufsatzsammlung. ¶
700 1 Gohlke, Holger. ¶
830 0 Methods and principles in medicinal chemistry ; (CorcAuthDB:3587863) =v v. 53. ¶
Changes You Can Make And Those That You Can’t

You CAN make these changes:
- 050 4 QP551 b .P69596 2012
- (field not present – ADD)
- 300 xx, 339 p. : b ill.
- (subfield c not present – ADD)
- Add LC subject headings (6XX 2nd indicator 0)

You CANNOT make this change:
- 020 9783527645947 (oBook)
  (subfield z not present: number appears on t.p. verso of print version)
Changes You Can Make: Database Enrichment

- Elements not previously coded in 006, 007, or 008 (Fixed field data)
- ISBN
- UPC
- Classification numbers
- Physical description area, e.g. height
- Contents notes
- Summaries
- Subject headings
- Series added entries
Adding Data to a Non-PCC Record

In addition to database enrichment fields, you can add or edit any other field, such as:

- Name access points
- Name plus title access points
- Any notes
- Most any other field
- You can use a Word document as a temporary holding place for data you are moving around
Technique for Adding Data

- Copy-and-paste information like contents notes or summaries from other sources, such as related records
  - e.g. electronic version of print record
- When doing this, watch for discrepancies between versions. Be sure to review and edit any data copied
- Be aware that not all data in “Library of Congress” records is necessarily from LC!
You can report any suspected error to OCLC
Submit duplicate record & bibliographic change requests via electronic error reporting that do not require proof
In Connexion, choose "Report Error" from the Action menu. A pop-up box will appear. If the fields are not populated, complete the form with your OCLC Symbol, your name, & your email address.
Provide details about the requested changes in the free text box.
Click on the 'Report Error' button and the error report will be submitted to the OCLC Quality Control Section.
Other Methods of Reporting Errors to OCLC

- Send e-mail to bibchange@oclc.org
- Use OCLC’s Web interface
- Report by fax
- Report by paper mail

For more information on methods of reporting, see OCLC *Bibliographic Formats and Standards* (Chapter 5):

Questions to Ask Yourself

1. Is there something I can do to improve this record?
2. Is it worthwhile to spend my time on this?
3. Will my additions/changes benefit other libraries?
4. Can I change it back later if I decide I ought not to have edited it?
5. Will I harm this record if I edit it?
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5. Will I harm this record if I edit it?
1. May we improve WorldCat Quality?
2. Can we implement record improvement as part of our procedures?
3. What training is needed for correcting or improving records?
4. How can we optimize our use of time?
5. How can we benefit from the work of other libraries?
Questions to Ask Your Director

1. Can our library become recognized as a leader in WorldCat Quality?
2. Can we form an alliance with other libraries for mutual assistance?
3. What adjustments to staff job descriptions might be required so that they will edit and/or report?
Further Detailed Training

OCLC offers free training.
The topic of “Editing Master Records” is covered in:

- Module 5 of the Connexion Browser training
- Module 6 of the Connexion Client training
  (next offering of Module 6 is scheduled on January 17 via the web)

Go to: http://training.oclc.org/training

to find out more and register
We’re happy to take questions now.

After the presentation, we’ll be happy to accept questions via email as well:

- Ian: ifairclough43302@yahoo.com
- Cynthia: whitacrc@oclc.org

Cataloging questions (not error reports) can also be sent to: askqc@oclc.org

Note: Yes, slides will be made available to those who registered