

Minutes of the
OCLC Enhance Sharing Session
with Jay Weitz, OCLC
Friday, January 24, 2014
10:30 a.m.-12:00 p.m.
Philadelphia Convention Center

**1. Pilot Project to Allow Members to Merge Duplicate Records in WorldCat;
Credits and Incentives**

Four institutions—UC San Diego, the University of Chicago, the University of Pennsylvania, and the University of Washington—have begun a project in which their catalogers are being trained to merge duplicate records in WorldCat. Training sessions have been in the form of conference calls. They aren't doing the actual merges yet, just examining and passing judgment on predetermined sets of proposed merged records, which OCLC reviews for accuracy. OCLC has been very pleased with the results and they expect to give the catalogers the mechanisms and authorizations to do the actual merges within the next few weeks.

This project is in addition to, not a replacement for, the OCLC de-dup programs, which continue to run. It will be up to each institution to decide which dups they will be working on. Most will do those they encounter in the course of their cataloging workflow, but they will be welcome to help with OCLC's backlog of records to be merged, if they so desire.

There was a question about the incentives for the project. Jay Weitz explained that there are no explicit incentives; merged duplicates and a cleaner WorldCat are their own reward. This led to a discussion of credits and incentives in general. Credits had always been given on a transaction basis, but since the OCLC fee structure changed in 2006 from transaction-based to subscription-based, the credits and incentives have been out of sync with the new structure. The member-led task force appointed by the OCLC Global Council in 2011 recommended new policies, with the old policies being phased out beginning in July 2014. There is an option to have the phase-out begin in 2015. Many libraries have already been informed of this. The changes have been designed to have little or no impact on OCLC costs for members. The credits history of each institution for Fiscal Years 2012 and 2013 will be used as the basis for the flat rate credit they will receive under the new system, regardless of whether they begin in July 2014 or July 2015. Questions about the credits and incentives should be sent to incentiveprograminput@oclc.org.

There were a number of questions about there being no penalties for the input of duplicate records, for the input of poor-quality records, for faulty record upgrades, or for other quality control issues. Weitz replied that such penalties would be impossible to administer. OCLC does deal with rectifying bad merges whenever they are reported. When a pattern of bad enhancements is seen at a particular institution OCLC may contact the staff there to ask that it stop. Members can use their own expertise to correct bad

enhancements and report to OCLC if they see a bad pattern emerging at a particular institution.

The pilot merge project is concentrating on English language print monographs. The actual process of merging duplicates can be done in just a few clicks. There is a list in BFAS of fields that automatically transfer under certain circumstances when a merge is performed. Catalogers need to pay attention to this because a human cataloger can be much more discerning than any automated process. Many of the new RDA fields such as the 33Xs, 34Xs, and others have been folded into OCLC's matching algorithms, although some of data in the new fields are redundant of existing data. The new fields may assist in matching, making it different but not harder.

2. Update of *Bibliographic Formats and Standards* Continues

OCLC completed revisions to BFAS to reflect the changes documented in Technical Bulletins 261 and 262. The larger project of thoroughly updating BFAS to incorporate RDA examples and practices will continue for many months. Outside experts have been contacted for certain specific areas to review the revisions and ensure that they are correct. This update is a huge job, with some 500 fields in all to be revised. The five massive chapters at the beginning are being saved for last. Each field that has been revised now has a "Last revised" note at the bottom of the page. Errors found should be reported to askqc@oclc.org.

To a question about reproductions Weitz replied that they are really a nightmare. OCLC is waiting until there is official guidance from the Joint Steering Committee for RDA and subsequent best practices documents in from the various cataloging communities before starting work on this section.

3. Connexion Client 2.50 Released

Connexion Client 2.50 is available for download at <http://psw.oclc.org/software/htm>. Members must install it by March 31 and reminders will begin to appear in early February. Three new scripts, Armenian, Ethiopic, and Syriac, are supported. There are new authorities indexes and updated macros.

4. Latest Release of MarcEdit has Greatly Enhanced Functionality in WorldCat

The WorldCat Metadata API (Application Programming Interface) makes possible a much greater functionality for the new release of MarcEdit within WorldCat, so that members can use it in a great variety of ways to contribute and enhance their bibliographic and holdings data.

5. New Data and Visualizations on MARC Usage in WorldCat Site

OCLC Research is studying the rate of use of MARC fields and subfields to determine the importance of various MARC elements as we move toward a new bibliographic framework. There are October 2013 reports and two new visualizations on the web site.

Q: How do you record a publication date inferred from a copyright date? Jay Weitz had said in brackets with a question mark, but PCC said no question mark.

A: Use brackets, no question mark, but if not inferred from a copyright date or other date on the item, the question mark may be appropriate.

Q: If we find errors in a foreign language record we can't correct them. Is there any way to report them?

A: We currently don't do much if any editing of bibliographic records with a language of cataloging other than English. In the not-too-distant future, there will be more interaction between VIAF and WorldCat, which might mean that there will be a way to report them.

Respectfully submitted by
Doris Seely
University of Minnesota
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