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## Capturing Collective Updates and Upgrades: Using OCLC WorldShare MARC Record Delivery at University of Kentucky Libraries

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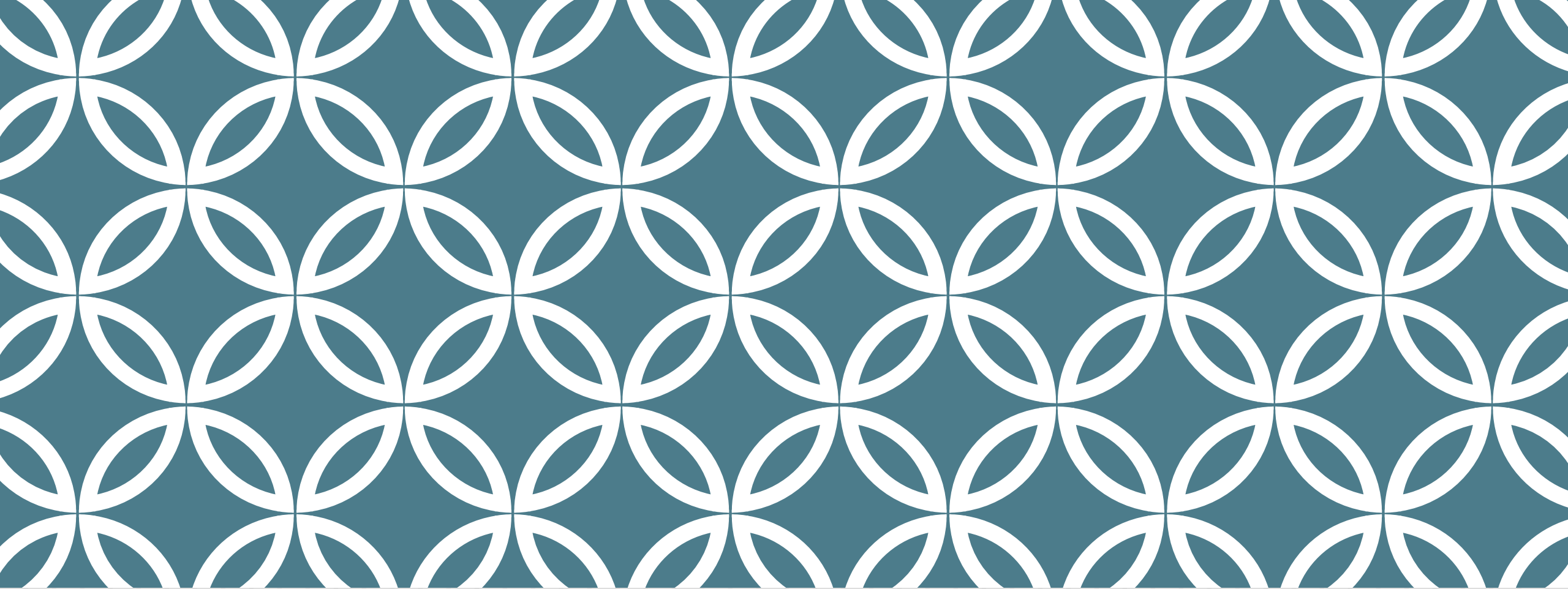
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# Capturing collective updates and upgrades: using OCLC WorldShare MARC Record Delivery at UK Libraries

Julene Jones  
ELUNA 2014

# IMPORTANCE OF LOCAL CUSTOMIZATION

Records from OCLC, vendors, Marcive, our original cataloging, etc.

+

Local standards, practices, preferences, codified:

FIELDS TO  
DELETE.doc

FIELDS TO  
ADD.doc

**RECORD EDITING**

User data (text) [50 characters] \_\_\_\_\_

- User data placement (check one)
- |                                    |                                    |                                    |                                    |
|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| <input type="checkbox"/> Field 590 | <input type="checkbox"/> Field 599 | <input type="checkbox"/> Field 910 | <input type="checkbox"/> Field 945 |
| <input type="checkbox"/> Field 946 | <input type="checkbox"/> Field 947 | <input type="checkbox"/> Field 948 | <input type="checkbox"/> Field 949 |
- Move call no. to 099 Field    or     Move 082 to 092
- Delete 5xx     Delete 6xx     Delete 7xx     Delete 8xx

**Holding Library Code (Required)****Record Selection Option 1**Deliver *only* the following Encoding Level upgrades.

- ALL    2    3    5    7    8    K    M

Deliver OCLC MARC records published

\_\_\_\_\_ and later (e.g., 1995 and later)

year

Deliver *only* the following Bibliographic records.

- ALL     SER     REC     MAP     COM
- BKS             SCO     VIS

Deliver records which my Institution upgraded?

- Yes     No

**Record Selection Option 2**

Deliver records with added or enhanced data to the 505 Field of the MARC records?

- Yes     No

# WHAT IS IT?

## “MARC Record Delivery”

Part of OCLC's WorldShare Metadata Collection Manager

Expanded profiling options!

Can interleave LHRs

Can deliver records from

- Collection sets in your KB
- Query collections
- WorldCat Holdings collections

# HOW DOES IT WORK?

If you are an OCLC cataloging subscriber,

OCLC posts free files of records you hold as they are updated

Every day, compares upgraded OCLC MARC records to those with your holding symbol

OCLC Control Number changes are automatically delivered, everything else is customizable

Files posted to OCLC's FTP site

# CUSTOMIZED “TRIGGER” FOR UPDATES

Can customize which updated records OCLC sends

Receive records because of any changes



Receive records because of changes to specific fields, or records for specific formats



# CUSTOMIZED RECORDS

## Can customize data in updated records

- Can add fields / subfields: holdings code, field with reason for delivery, delivery date
- Can delete fields / subfields : 029 or 650 \_7
- Can customize 856
- Can include Local Holdings Records
- Can set record schema of delivered files: MARC, MARCXML, MODS, Dublin Core
- Entire record is delivered, not just updated fields



## ▼ Manage Collections

[Settings](#)[Library Holdings](#)[Create Standard  
Collection](#)[Create WorldCat Query  
Collection](#)[Activity History](#) My Library Holdings Only

Collection ▼

[▶ My Apps](#)

## Manage Library Holdings

[▶ Upload Library Holdings File](#)[▶ Download Library Holdings File](#)[▶ Data Feeds](#)[▶ Use Knowledge Base Coverage to Determine Article Holdings in WorldCat Local Discovery Interface](#)[▶ Limit Access by IP Address](#)[▶ Share Holdings](#)[▶ Maintain Holdings in WorldCat](#)[▶ Enable MARC Record Delivery](#)[▶ Google Scholar](#)[▶ Limit Partner Access to Holdings](#)

▼ Enable MARC Record Delivery

Yes  No

Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system.  
OCLC Symbol KUK

Customize Records

WorldCat Updates

Record Delivery

Reports

Options for All Collections

Holding Library Code (049 \$a)

KUKK

Delete Fields

| Tag   | Ind 1 | Ind 2 |   |
|-------|-------|-------|---|
| 263 ▼ | Any ▼ | Any ▼ | + |
| 265 ▼ | Any ▼ | Any ▼ | - |
| 850 ▼ | Any ▼ | Any ▼ | - |
| 886 ▼ | Any ▼ | Any ▼ | - |
| 891 ▼ | Any ▼ | Any ▼ | - |
| 938 ▼ | Any ▼ | Any ▼ | - |

Delete Subfields

| Tag | Ind 1 | Ind 2 | Subfield |   |
|-----|-------|-------|----------|---|
| ▼   | Any ▼ | Any ▼ | ▼        | + |
|     |       |       |          | - |

## Add Fields

|        | Tag | Ind 1   | Ind 2   | Subfield |        |        | Value                         | Tag    |  |
|--------|-----|---------|---------|----------|--------|--------|-------------------------------|--------|--|
| ↑<br>↓ | 995 | Blank ▾ | Blank ▾ | a ▾      | ↑<br>↓ | +<br>- | [Reason for Updated Record] ▾ | +<br>- |  |
|        |     |         |         | b ▾      | ↑<br>↓ | +<br>- | [Transaction Type] ▾          |        |  |
|        |     |         |         | c ▾      | ↑<br>↓ | +<br>- | Bib Notification ▾            |        |  |

### Reasons for updated records

OCLC control number change

Master record variable field(s) change

Master record DtSt change

Master record 040 RDA change

Master record encoding level change

=LDR 01803cam a2200373 i 4500

=001 ocm00807640\

=005 20140422124854.2

=008 740219s1908\\inua\\000\\1\eng\\

=010 \\\$a 08030618

=040 \\\$aDLC\$beng\$erda\$cHEI\$dDLC\$dOCLCQ\$dOCLCG\$dKRTAS\$dHU9\$dOCLCA\$dUPM

=019 \\\$a18002275

=035 \\\$a(OCOLC)00807640\$z(OCOLC)18002275

=042 \\\$apcc

=050 00\$aPZ3.A5684\$bB\$aPS3501.N569

=049 \\\$aKUKK

=100 1\\\$aAndrews, Mary Raymond Shipman,\$d-1936,\$eauthor.

=245 14\$aThe better treasure /\$cby Mary Raymond Shipman Andrews, author of The perfect tribute ;  
with illustrations by H.M. Bunker.

=264 \1\$aIndianapolis :\$bThe Bobbs-Merrill Company, Publishers,\$c[1908]

=264 \4\$c©1908

=300 \\\$a72 pages, 1 unnumbered leaf of plates :\$billustrations ;\$c21 cm

=336 \\\$atext\$btxt\$2rdacontent

=337 \\\$aunmediated\$bnc\$2rdamedia

=338 \\\$avolume\$bnc\$2rdacarrier

=500 \\\$aIncludes frontispiece; borders of pages illustrated throughout.

=650 \0\$aChristmas stories.

=700 1\\\$aBunker, Harry M.,\$eillustrator.

=776 08\$iOnline version:\$aAndrews, Mary Raymond Shipman, d. 1936.\$tBetter treasure.\$dIndianapolis,  
Bobbs-Merrill [1908]\$w(OCOLC)647027428

=995 \\\$aMaster record variable field(s) change: 100,  
700 - Master encoding level change\$bUPDATED\$cBib  
Notification

=995 \\\$aMaster record variable field(s) change: 100, 700 - Master record encoding level  
change\$bUPDATED\$cBib Notification

### Update Conditions

Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.

- Any change to the WorldCat master record
- Select options for specific changes to the WorldCat master record

### Specify **Including** Conditions

#### Variable Fields

Deliver records if the following fields are added, updated, or deleted in the master record:

| Tag |     | Ind 1 | Ind 2 |       |                          |
|-----|-----|-------|-------|-------|--------------------------|
| 1 ▾ | X ▾ | X ▾   | Any ▾ | Any ▾ | <input type="checkbox"/> |
| 7 ▾ | 0 ▾ | 0 ▾   | Any ▾ | Any ▾ | <input type="checkbox"/> |

#### Encoding Levels

Deliver records if the Encoding Level changes to the following value(s):

- Blank
- 1
- 4
- 5
- 7
- 8
- I
- K
- L
- M

#### Other Options

Deliver records if the:

- Date/Publication Status (DtSt) changes
- 040 changes to include 040 \$e rda

▶ Specify **Including** Conditions

▼ Specify **Excluding** Conditions

Material Types

Do not deliver records of selected material type(s):

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Book            | <input checked="" type="checkbox"/> Computer File  | <input type="checkbox"/> Continuing Resource |
| <input checked="" type="checkbox"/> Map  | <input checked="" type="checkbox"/> Mixed Material | <input type="checkbox"/> Score               |
| <input type="checkbox"/> Sound Recording | <input type="checkbox"/> Visual Material           |  |

Publication Date

Do not deliver records for materials published in:

and before

My Updates

Do not deliver records upgraded by my library. Choose the OCLC symbol(s):

- 4XX  
 KUK

Note: OCLC symbols are pulled from the WorldCat Registry. To add or remove symbols, visit your WorldCat Registry record.

Total number of records: 104

| Provider | Collection name   | Title  | ISBN/ISSN     | OCLC number | File Name  | Action  | Update Reason  |
|----------|-------------------|--|---------------|-------------|--|---------|--|
| OCLC     | WorldCat Holdings | Metal finishing.   | 0026-0576     | 1757174     | metacoll.KUK.updates.D20140422.T240529.ser.1.mrc | UPDATED | Master record DtSt change  |
| OCLC     | WorldCat Holdings | Russkie v svoikh poslovit slakh :  | 9785397025119 | 767881410   | metacoll.KUK.updates.D20140422.T240529.1.mrc     | UPDATED | Master record variable field(s) change: 100 - Master record encoding level change      |
| OCLC     | WorldCat Holdings | The better treasure /  |               | 807640      | metacoll.KUK.updates.D20140422.T240529.1.mrc     | UPDATED | Master record variable field(s) change: 100, 700 - Master record encoding level change |
| OCLC     | WorldCat Holdings | Canada, a people's history, set 2 /  | 1552599531    | 876992412   | metacoll.KUK.updates.D20140422.T240529.1.mrc     | UPDATED | OCLC control number change   |
| OCLC     | WorldCat Holdings | Semiannual report on the activities of the Committee on the Judiciary of the House of Representatives during the |               | 770993129   | metacoll.KUK.updates.D20140422.T240529.ser.1.mrc | UPDATED | Master record DtSt change  |
| OCLC     | WorldCat Holdings | The founder of Christianity /  | 0020846401 :  | 63796       | metacoll.KUK.updates.D20140422.T240529.1.mrc     | UPDATED | Master record variable field(s) change: 100  |
| OCLC     | WorldCat Holdings | Wool tariffs and American policy.  |               | 525551      | metacoll.KUK.updates.D20140422.T240529.1.mrc     | UPDATED | Master record variable field(s) change: 100  |

# EXAMPLE 1, MERGING: ORIGINAL

|        |  |     |
|--------|--|-----|
| Leader | 01100cas a22002651a 4500                                 | 006 |
| 005:   | 20061204125731.0   | 007 |
| 008    | 821215 d 19uu 195u cau u u _ _ _ _ _ _ _ 0 _ a 0 eng _ d |     |

| Tag   | I1 | I2 | Subfield Data   |
|-------|----|----|---|
| ◆ 035 |    |    | #a (OCoLC)ocm09057012   |
| 040   |    |    | #a NYG #c NYG #d OCLCQ #d KUK   |
| 043   |    |    | #a n-us---  |
| 090   |    |    | #a HD1759 #b .C32   |
| 049   |    |    | #a KUKK   |
| 245   | 0  | 0  | #a Contribution from the Giannini Foundation of Agricultural Economics, mimeographed report.              |
| 260   |    |    | #a Berkeley, Calif. : #b University of California, College of Agriculture, Agriculture Experiment Station |
| 300   |    |    | #a v. ; #c 29 cm.   |
| 500   |    |    | #a Each no. has also a distinctive title.   |
| 500   |    |    | #a Description based on: No. 103 (Feb. 1950); title from cover.   |
| 650   |    | 0  | #a Agriculture #x Economic aspects #z United States.  |
| 710   | 2  |    | #a Giannini Foundation of Agricultural Economics.   |
| 710   | 2  |    | #a California Agricultural Experiment Station.  |
| 780   | 0  | 0  | #t Contribution of the Giannini Foundation of Agricultural Economics, mimeographed report                 |
| 785   | 0  | 0  | #t Mimeographed report (Giannini Foundation of Agricultural Economics) #w (OCoLC)09058120                 |



# EXAMPLE 1, MERGING : MERGED WITH #9056755

|     |     |   |
|-----|-----|---|
| 010 |     | 2013254553  |
| 040 |     | NYG #b eng #e rda #c NYG #d OCLCQ #d CUV #d OCLCF   |
| 019 |     | 9057012   |
| 042 |     | pcc   |
| 043 |     | n-us---   |
| 050 | 4   | HD1527.C2 #b C3   |
| 050 | 4   | HD1751 #b .C32  |
| 082 | 0 4 | 338.1082 #b qC1483  |
| 245 | 0 0 | Contribution from the Giannini Foundation of Agricultural Economics.  |
| 246 | 1   | #i Some issues have title: #a Contribution from the Giannini Foundation of Agricultural Economics, mimeographed report #f no. 6-7,14,17,23-29,31-40,42-43,50-51,53-56,59-61,63-69 |
| 246 | 1   | #i Some issues have title: #a Contribution of the Giannini Foundation of Agricultural Economics, mimeographed report #f no. 41,44-49,52,57-58,62                                  |
| 264 | 1   | Berkeley, California : #b University of California, College of Agriculture, Agricultural Experiment Station, #c 1930-1940.  |
| 300 |     | 69 volumes ; #c 29 cm   |
| 310 |     | Irregular   |
| 336 |     | text #2 rdacontent  |
| 337 |     | unmediated #2 rdamedia  |
| 338 |     | volume #2 rdacarrier  |
| 362 | 1   | Began with No. 1 (1930); ceased with no. 69 (1940).   |
| 500 |     | Some issues lack series title and/or numbering.   |
| 588 |     | Description based on: No. 1 (1930); title from cover.   |
| 588 |     | Latest issue consulted: No. 69 (1940).  |
| 650 | 0   | <a href="#">Agriculture</a> #x <a href="#">Economic aspects</a> #z <a href="#">United States</a> .  |
| 710 | 2   | <a href="#">California Agricultural Experiment Station</a> .  |
| 710 | 2   | <a href="#">Giannini Foundation of Agricultural Economics</a> .   |
| 785 | 0 0 | #t Mimeographed report (Giannini Foundation of Agricultural Economics) #w (OCoLC)9058120  |

# EXAMPLE 2, FULLNESS

**MARC** | System | History

Suppress from OPAC

Leader 00742cas a2200253 4500 006

005: 20080805130745.0 007

008 750929 d 1950 1962 dcu u u \_ p \_ \_ \_ \_ 0 \_ a 0 eng \_ d

| Tag | I1 | I2 | Subfield Data  |
|-----|----|----|--|
| 022 |    |    | #a 0509-8319   |
| 035 |    |    | #a (OCoLC)ocm01661032  |
| 035 |    |    | #9 ADB3780LM   |
| 040 |    |    | #a FUL #c FUL #d MUL #d NSD #d DLC #d MUL #d KUK                                 |
| 049 |    |    | #a KUKK  |
| 082 | 1  |    | #a 677   |
| 090 |    |    | #a NK8802.W3 #b A295   |
| 099 |    |    | #a 746 #a W2764  |
| 110 | 2  |    | #a Textile Museum (Washington, D.C.)   |
| 245 | 1  | 0  | #a Workshop notes.   |
| 260 |    |    | #a Washington, D.C., #b Textile Museum.  |
| 300 |    |    | #a v.  |
| 362 | 0  |    | #a No. 1-24; 1950-62.  |
| 650 |    | 0  | #a Textile industry and fabrics #x Societies, etc.                               |
| 785 | 0  | 2  | #a Textile Museum (Washington, D.C.) #t Textile Museum journal #w (OCoLC)1769413 |
| 909 |    |    | #a 746 W2764 #z Reclass ser  |

OC LC 1661032 Held by KUK/LHR - 68 other holdings; 14 other IRs  
1 KUK holding in GLIMIR cluster; 68 other holdings in GLIMIR cluster of 1

|      |   |      |   |      |   |      |   |       |      |      |      |
|------|---|------|---|------|---|------|---|-------|------|------|------|
| Type | a | ELV  | l | Srce | d | GPub |   | Ctrl  |      | Lang | eng  |
| BLV  | s | Form |   | Conf | 0 | Freq | f | MRec  |      | Ctry | dcu  |
| S/L  | 0 | Orig |   | EntW |   | Regl | r | Alph  | a    |      |      |
| Desc | a | SrTp | m | Cont |   | DtSt | d | Dates | 1950 |      | 1961 |

|     |   |   |   |
|-----|---|---|---|
| 040 |   |   | FUL #b eng #c FUL #d MUL #d NSD #d DLC #d MUL #d UBY #d BMF #d YAM                            |
| 019 |   |   | 9799764   |
| 022 |   |   | 0509-8319   |
| 050 | 1 | 4 | NK8800 #b .W67  |
| 082 | 0 | 4 | 677   |
| 090 |   |   | #b  |
| 049 |   |   | KUKK  |
| 130 | 0 |   | Workshop notes (Textile Museum (Washington, D.C.))  |
| 245 | 1 | 0 | Workshop notes / #c Textile Museum.   |
| 246 | 1 |   | Paper (Textile Museum (Washington, D.C.))   |
| 260 |   |   | [Washington, D.C.] : #b [Textile Museum], #c [[1950?-1961]                                    |
| 300 |   |   | 24 nos. : #b illustrations ; #c 28 cm   |
| 310 |   |   | 2 nos. per year   |
| 336 |   |   | text #b txt #2 rdacontent   |
| 337 |   |   | unmediated #b n #2 rdamedia   |
| 362 | 1 |   | Began with paper no. 1; ceased with paper no. 24 (Nov. 1961).                                 |
| 500 |   |   | Caption title (papers nos. 1-11 lack title).  |
| 500 |   |   | Each no. has also a distinctive title.  |
| 515 |   |   | Paper no. 1 undated; paper no. 2 dated June 1950.   |
| 650 | 0 |   | Textile fabrics.  |
| 650 | 0 |   | Textile fabrics #x Conservation and restoration.  |
| 710 | 2 |   | Textile Museum (Washington, D.C.)   |
| 776 | 0 | 8 | #i Online version: #a Textile Museum (Washington, D.C.) #t Workshop notes #w (OCoLC)564740531 |
| 785 | 0 | 0 | #t Textile Museum journal #x 0083-7407 #w (OCoLC)1769413                                      |

# EXAMPLE 3

| Voyager  | OCLC  |
|--|---|
| 035  a (OCoLC)221773813  | 035  a (OCoLC)1368283  z (OCoLC)221773813   |
| 100 1\  a Hamilton, Charles,  d 1913-  | 100 1\  a Hamilton, Charles,  d 1913- <u>1996</u> .   |
| 245 14  a The robot that helped to make a President ;  b a reconnaissance into the mysteries of John F. Kennedy's signature. | 245 14  a The robot that helped to make a President :  b a reconnaissance into the mysteries of John F. Kennedy's signature /  c <i>by Charles Hamilton</i> . |
| 260 \\\  a New York,  c 1965.  | 260 \\\  a New York :  b <i>C. Hamilton</i> ,  c 1965.  |
| 300 10  a xiv, 63 p.  b illus., facsims., ports.  c 32 cm.   | 300 \\\  a xiv, 63 p. :  b <i>ill.</i> :  c 32 cm.  |
| [field not in UK's record]   | <u>500 \\\  a <i>Includes index.</i></u>  |
| [field not in UK's record]   | <u>500 \\\  a "This book was designed by Charles Hamilton and Diane Hamilton and printed in 14-point ...</u>  |
| [field not in UK's record]   | <u>505 0\  a <i>Man or robot? -- To sign or not to sign : some proxy signatures -- Frankly speaking: Kennedy's ...</i></u>                                    |

# UK WORKFLOWS

Implemented service on a trial basis

Records from multiple vendors, including Marcive

Multiple proxy-server links

Accept RDA and non-RDA records

Workflows surrounding authority control, authority updates:

- Peter Ward subject headings
- OCLC RSS feed for closed dates in personal name headings
- Music Library Association's Music Cataloging Bulletin
- Local unauthorized heading reports

# UK'S PROFILE, FIRST REVISION

Receive records for all formats held by KUK

Any changes in DtSt

Triggered by changes in access points or encoding level change

1XX

6XX (2<sup>nd</sup> ind 0 or 2)

7XX

8XX



to blank or I

Local note added to include “reason for delivery”

# UK'S PROFILE, CURRENT REVISION

Receive records for all formats held by KUK

Any changes in DtSt

Triggered by changes in selected access points or encoding level change

1XX

7XX



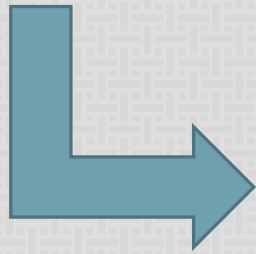
to blank or I

Still reviewing records one-by-one from delivered file

# RESULTS

Started receiving files in mid-July 2013

Average of ~ 200 records / day on current profile



**Lots** of authority cleanup!

**Lots** of record-reviewing!

Largest file so far under most recent profile: 4,406 records

Most common field edited: 100

# TWO THINGS TO NOTE!!

Check your [overlay profile](#) / methodology!

- Records that are suppressed may become unsuppressed
- You may lose local edits
  - OCLC sends the entire record, not just the edits

[Communicate](#) with your catalogers!

As Lori Robare says, “chocolate helps!”



# RESOURCES

For more information: <http://www.oclc.org/worldshare-metadata.en.html>

“Moving Beyond Bibliographic Record Notification” webinar by Julie Whitley & Cynthia Whitacre (2013)

Julene Jones

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